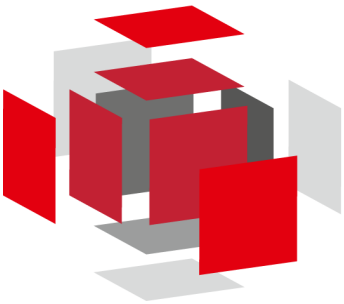
Kaleidoscope®

EXPRESS YOUR BIZ

Excelling MultiTerm

User Manual



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Solutions for language workers
by Kaleidoscope

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1 Introduction

Purpose

Excelling MultiTerm provides a bidirectional interface between *SDL MultiTerm* (Desktop or Server) and Microsoft Excel. The purpose of this tool is to export entries from MultiTerm to Excel, then edit these entries off-line and finally import them back again into MultiTerm. In Excel you can edit existing terms, fields and entries, and you can add new ones. If you want to delete a term, then you can for instance change it to "deleted" and after import use the batch delete function to delete all terms called "deleted".

You can also use Excelling to batch-import entries or terms into an existing or a new termbase.

Possible Applications

For the *individual user* Excelling MultiTerm can be useful if the content of one field needs to simultaneously be changed in many entries. Or if a larger quantity of data needs to be exported for easy editing across multiple data records and subsequently imported again. Excelling MultiTerm is also well-suited for easily importing Excel files to MultiTerm.

At *companies* Excelling MultiTerm decentrally supports two fundamental processes:

- The release or editing of entries by persons who do not have MultiTerm, including, for example, project heads or product managers. A MultiTerm database can simply be filtered and exported to Excel, edited in Excel, and then directly imported from Excel back to MultiTerm.
- The multilingual development of a termbase by external employees who do not have MultiTerm. For this application, a specific filter for "untranslated" entries can be combined with any other MultiTerm filter to export the desired parts of the termbase to Excel, where they can be translated by a translator directly in Excel. Then the file is directly imported from Excel back to MultiTerm.

Functional Principle

For export *Excelling MultiTerm* directly accesses the Excel and MultiTerm application programming interfaces (APIs), so it does not perform a "normal" export using MultiTerm's export function, but adds the contents field by field to an Excel table or imports it field by field from Excel back to MultiTerm.

That is how Excelling MultiTerm solves problems that emerge when directly exporting from MultiTerm e.g., to a tab-delimited file. So Excelling can do the following:

- Manage empty field contents, which can lead to problems in normal tab-delimited export.
- Create structured tables, even if MultiTerm contains e.g., synonyms or several definitions or something like that (In fact this cannot be achieved using the "normal" MultiTerm export).
- Synchronize the correct entries when importing homonyms. Excelling does this by exporting the concept ID.

Additional Features

Excelling MultiTerm contains several additional features that can be useful for maintaining and cleaning termbases:

- Termbases can be checked for duplicates in all languages simultaneously.
- Termbases can be checked for duplicate synonyms within one entry
- Wrong or inconsistent termbase content can be fixed, such as wrong languages, wrong field names or wrong pick list values
- Terms within an entry can be rearranged according to certain descriptive fields (for instance, all "standard" terms can be moved to the top of the entry), or all fields in the entire termbase can be sorted in a specific way.
- Termbase content can be selectively deleted, for instance by deleting a certain language or by deleting all terms for a certain MultiTerm filter

Batch Mode

In order to automate processes, Excelling MultiTerm can be executed in Batch Mode. With Windows task planner you can, for instance, run a certain set of exports or imports routinely on a certain weekday at a set time.

2 Installation

2.1 System Requirements

- Local installation of MultiTerm client starting from version 7. Local and server-based termbases are supported The hotfix of KB-article http://talisma.sdl.com/article.aspx?article=1536&p=1 must be installed for MultiTerm 2007
- Windows XP or higher, both 32 or 64 bit versions are supported
- Microsoft .net Framework 3.5 SP1
- An internet connection for product activation

2.2 Installation

The installation of Excelling MultiTerm is done with the aid of a Windows installer. The only parameter that must be entered is the path where the export and import definitions are to be saved. By default this is the sub-directory "Settings" within the Excelling MultiTerm installation directory.

Deinstallation is done using the control panel. Any existing task definitions are intentionally not deleted so that they are available for a potential reinstallation or upgrade.

Windows security settings for license and configuration files

Due to Windows security policies, particularly with Windows Vista and Windows 7, only the base configuration file is stored in the program directory. The license file and all client-specific configuration files will be stored in the user´s profile.

For Windows XP this is c:\documents and settings\all users\application files \Kaleidoscope\. For Windows Vista and Windows 7 this is c:\programdata \Kaleidoscope\.

Users need write access to this directory, because the license file is touched at each program start and configuration changes are written to the configuration file.

Trial version

After the initial installation, you can test the software with a full feature set for 3 days. After this time period, the software will be deactivated and has to be registered. If you have already purchased the software before installation, you can immediately register it.

It is not possible to circumvent the time limitation by changing the system date. The license will detect this manipulation and will automatically expire. You then have to immediately register the software.

Installing Updates

You can simply install an update by installing it on top of the older version. All settings will be maintained.

However, you will be asked whether you want to also overwrite the license file. Please answer this question with "No" so your original license will also be maintained and you will not have to re-register the software.

2.3 Registration and Activation

License Versions

Excelling MultiTerm is available in four versions:

- As *single desktop license*: In this case, activation is done directly at the workplace where the license will be used.
- As a *freelance license*: The freelance version only works with local termbases and only with up to 5 languages. Apart from that, the registration works just like for the single desktop license.
- As a *network license*: (Also called *concurrent* or *floating* license) with parallel access from several PCs In this case the license file is stored on a network share which is accessible by all client PCs.
- As *demo version*. After installation, Excelling MultiTerm will run for 3 days as a fully functional application with all features available. After this, the trial expires, which can also be seen in the title bar of the application. Once it has expired, Excelling MultiTerm must be registered and activated.

Administration Rights

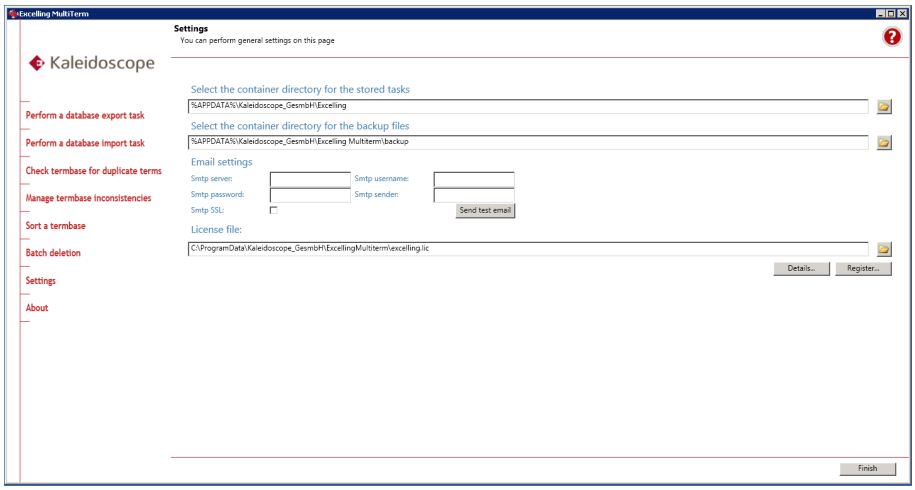
In order to activate Excelling MultiTerm, the application has to be started with administrative rights. Otherwise windows cannot access the configuration file.

See also

- Registration as a Desktop License [→ 8]
- Registration as a Network License [→ 11]
- Settings [→ 16]

2.3.1 Registration as a Desktop License

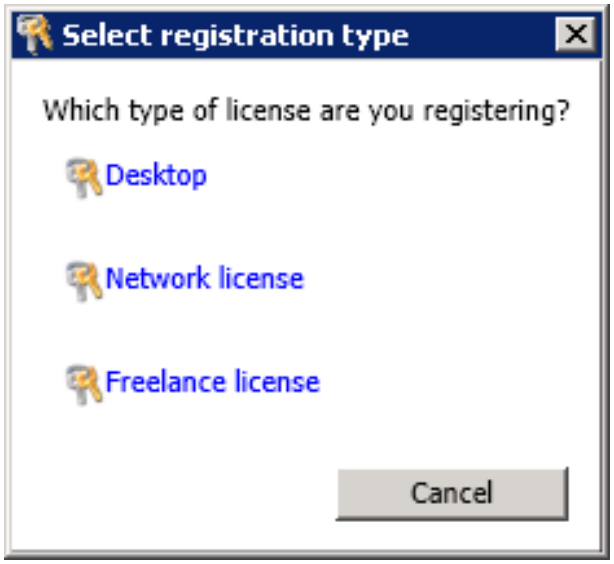
Registration is done on the *Settings* page:



Settings Area

In this dialog you see several options which are explained in detail in the section Settings [→ 16]. Registration is done with the last item in the window. Here you see a list of available license files, typically one license file. By default a demo license is available.

Select the license and click on *Activate*. The question pops up: Which type of license are you activating?:

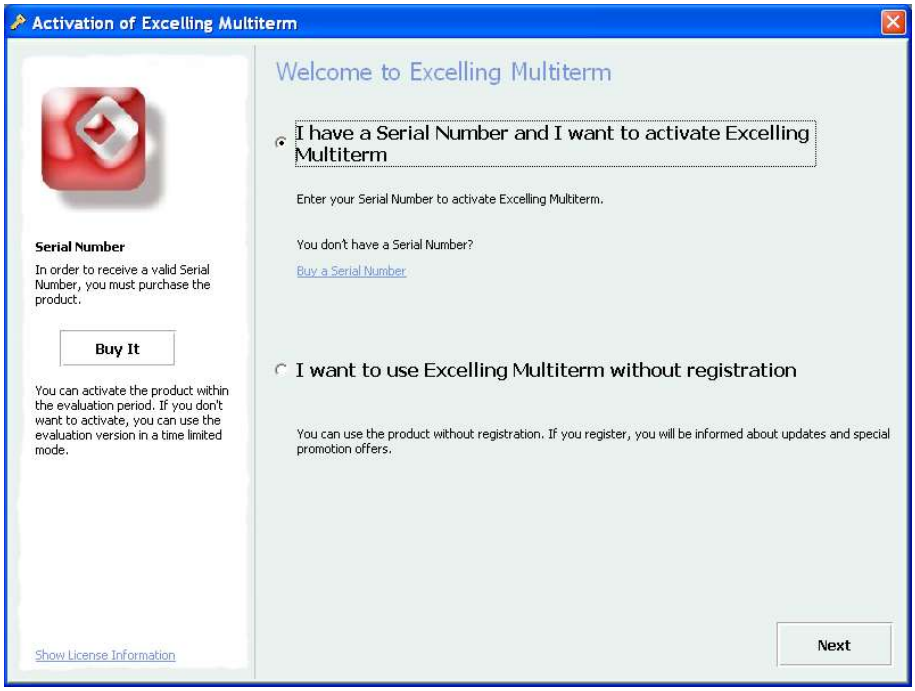


Activation: Type of license

Please select:

- *Single Desktop* or
- *Freelance License*:

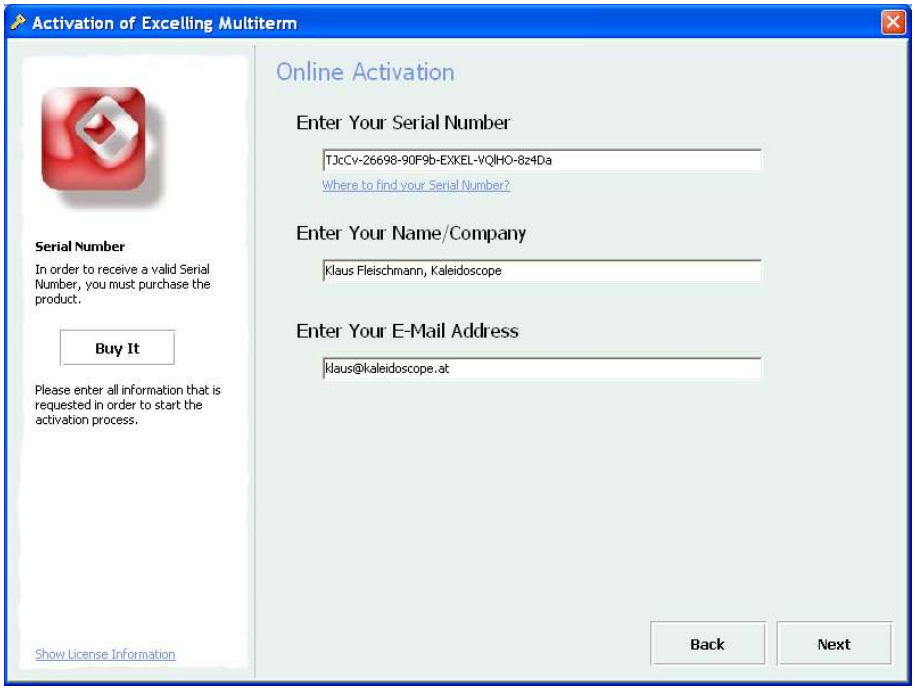
The product activation screen pops up:


Activation of Excelling Multiterm
Welcome to Excelling Multiterm
I have a Serial Number and I want to activate Excelling Multiterm
Enter your Serial Number to activate Excelling Multiterm.
You don't have a Serial Number?
Buy a Serial Number
I want to use Excelling Multiterm without registration
You can use the product without registration. If you register, you will be informed about updates and special promotion offers.
Serial Number
In order to receive a valid Serial Number, you must purchase the product.
Buy It
You can activate the product within the evaluation period. If you don't want to activate, you can use the evaluation version in a time limited mode.
Show License Information
Next

Activation: Serial Number or Demo

Select the first option and click on *OK*.

The screen pops up to enter the user data:

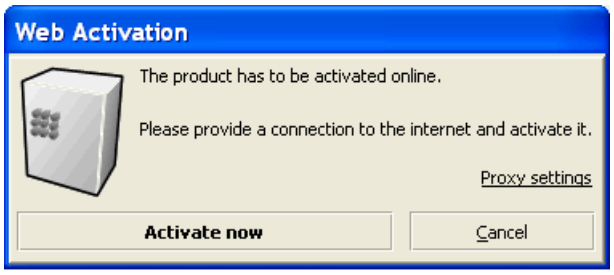

Activation of Excelling Multiterm
Online Activation
Enter Your Serial Number
TJcCv-26698-90F9b-EXKEL-VQIHO-8z4Da
Where to find your Serial Number?
Enter Your Name/Company
Klaus Fleischmann, Kaleidoscope
Enter Your E-Mail Address
klaus@kaleidoscope.at
Serial Number
In order to receive a valid Serial Number, you must purchase the product.
Buy It
Please enter all information that is requested in order to start the activation process.
Show License Information
Back
Next

Activation: User Data

In the first field, enter the serial number you received when you purchased Excelling MultiTerm. Enter your company name and optionally a user name. In the last field, please enter your e-mail address.

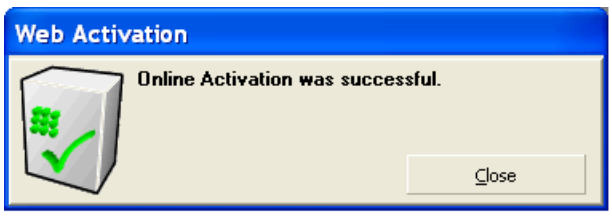
Activation

The next step is the online activation of the license. In the next dialog field, please confirm the activation by selecting "*Activate now*":


Web Activation
The product has to be activated online.
Please provide a connection to the internet and activate it.
Proxy settings
Activate now
Cancel

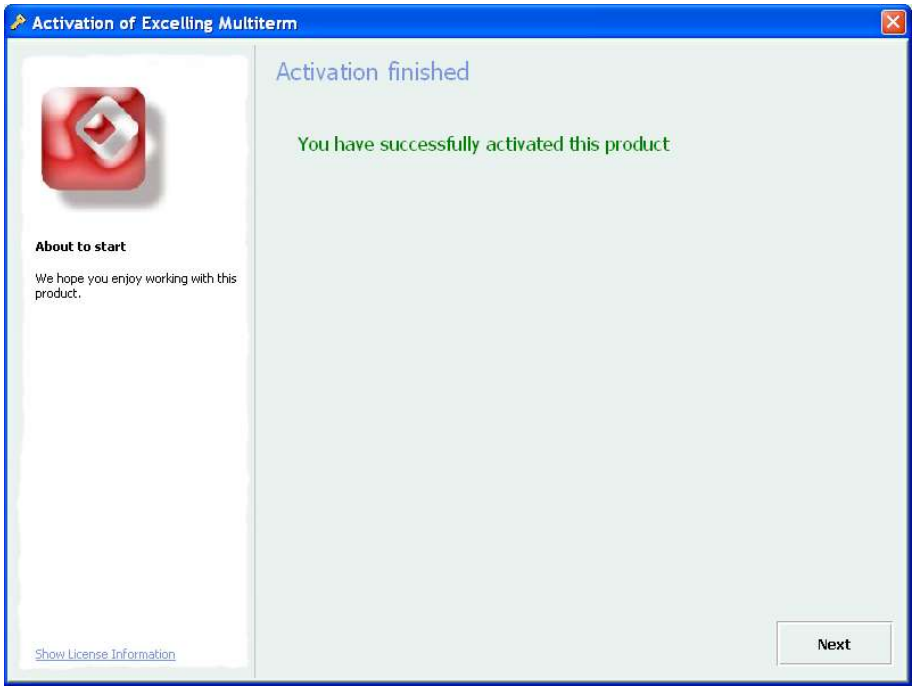
Activation: Establish a Connection

If activation was successful, the activation server first confirms this:



Activation: Confirmation

Then Excelling MultiTerm also confirms activation:



Activation Finished

To complete the activation of your copy of Excelling MultiTerm, you need to restart the program.

See also

- Settings [→ 16]

2.3.2 Registration as a Network License

Step 1: Activate the license file on a shared network folder

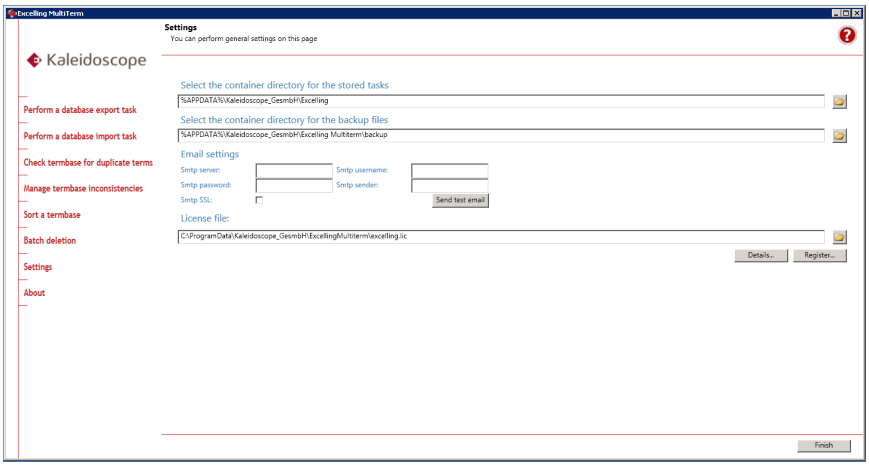
In order to use Excelling MultiTerm as a network (also called *concurrent* or *floating*) license, copy the license file to a shared network folder where all clients have access **BEFORE ACTIVATING IT**.

To do this, proceed as follows:

a) By default, the license is stored in the folder *ProgramData\Kaleidoscope\ExcellingMultiTerm* or on older Windows systems *Documents and Settings\All Users\ApplicationData\Kaleidoscope_GesmbH\ExcellingMultiterm*. The filename is *excelling.lic*.

b) Copy this file to a network share.

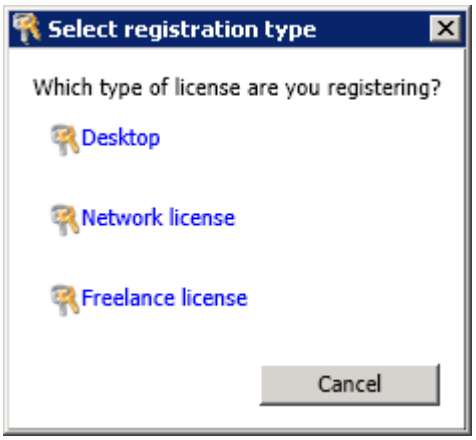
c) Then, start Excelling MultiTerm and switch to the Settings screen.



d) Click on the icon next to the license file and choose the file **FROM THE NETWORK SHARE**.

e) Now click on *Activate...*

⇨ You will be prompted to select which license you want to activate.

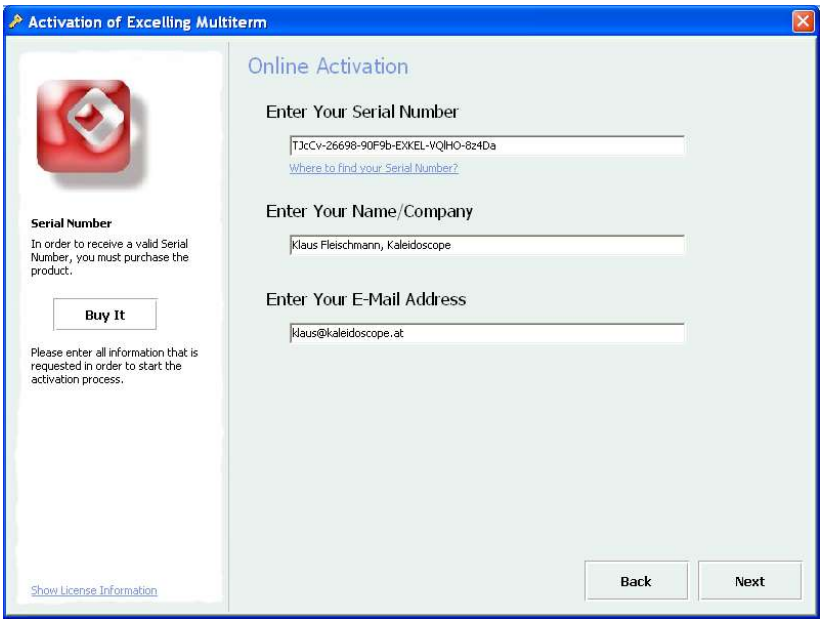


f) Select *Network License*.

⇨ The product activation screen pops up:

g) Select the first option ("Serial Number") and then click on *Next*.

⇨ The screen pops up to enter the user data:


Activation of Excelling Multiterm
Online Activation
Enter Your Serial Number
TJcCv-26698-90F9b-EKKEL-VQlHO-8z4Da
Where to find your Serial Number?
Enter Your Name/Company
Klaus Fleischmann, Kaleidoscope
Enter Your E-Mail Address
klaus@kaleidoscope.at
Serial Number
In order to receive a valid Serial Number, you must purchase the product.
Buy It
Please enter all information that is requested in order to start the activation process.
Show License Information
Back
Next

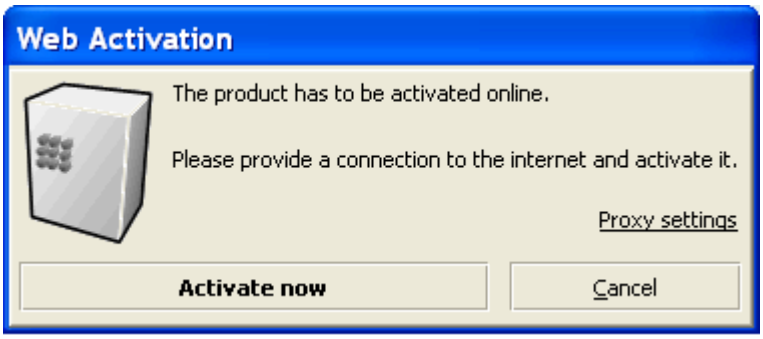
h) In the first field, enter the serial number you received when you purchased Excelling MultiTerm. Enter your company name and optionally a user name. In the last field, please enter your e-mail address. Then click on *Next*.

⇨ The license will now be activated from our license server.

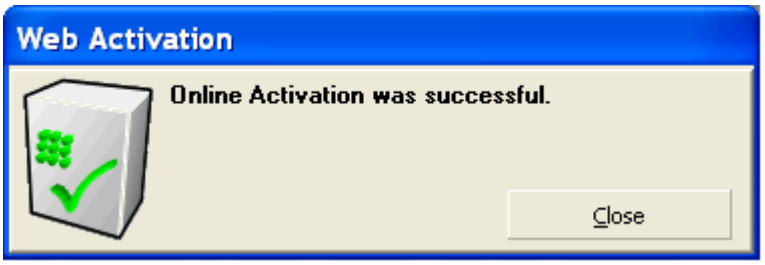
NOTE: If your network uses a proxy server and you have not set this proxy up in the Internet Explorer settings by default, click on "Proxy Settings" and then enter the respective data. Otherwise click "Activate now". The application will now contact our license server via Internet and verify the license key.

NOTE: If your network infrastructure does not allow online activations, then you can activate via e-mail. For this you will need an e-mail client installed on the machine. Click on the respective link and follow the instructions given by the wizard.

i) Click on "*Activate now*".


Web Activation
The product has to be activated online.
Please provide a connection to the internet and activate it.
Proxy settings
Activate now
Cancel

⇨ The activation will now be confirmed:



j) Restart Excelling MultiTerm to conclude the activation.

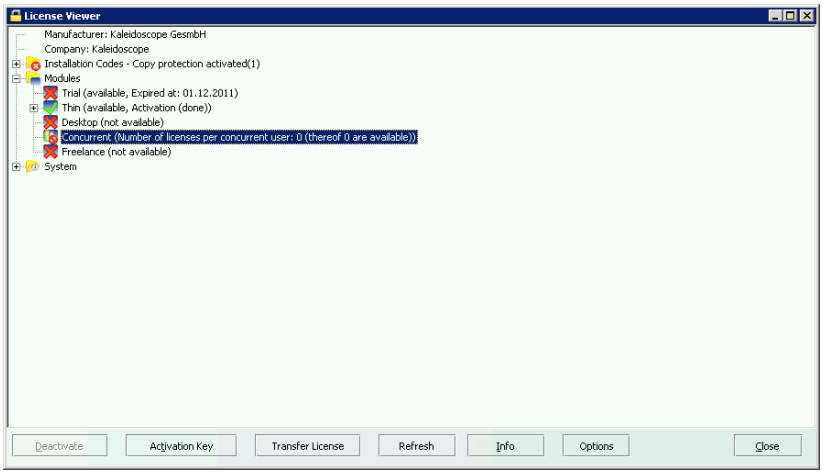
Step 2: Activating the Concurrent Option

After activating the license file on the network share, it has to be set into "concurrent" mode so that clients can access it simultaneously. To do this, proceed as follows:

a) Switch to the Settings screen again.

b) Click on "Details".

⇨ You will see the License Viewer displaying the license details:



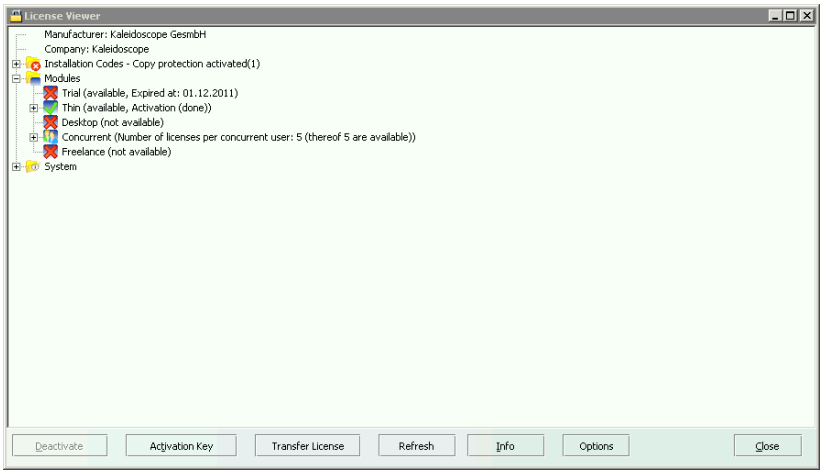
You can see that the *Concurrent* option is not active yet. This is what we are doing in step 2.

c) Click on "*Activation Key*".

d) Enter the activation code you received from Kaleidoscope (*Module Concurrent*).

e) Click on OK.

⇨ The network option will now be activated. The number of concurrent access users will be increased depending on the license you purchased.



Step 3: Using this License on other Clients

You can now activate other clients by replacing their local license file and pointing to the activated license file on the network share.

2.3.3 License Transfer

It is not possible to transfer a license to another computer. If you want to use several instances of Excelling MultiTerm in parallel, please upgrade to a concurrent network license.

If you need a new license because you changed computer, please contact us so we can send you a new license key.

2.3.4 Offline Activation

If you can not activate the software online on your machine via Internet, then you can activate offline via email. Please proceed as follows:

➢ You must already have a valid serial number for your software from Kaleidoscope.

a) In the start screen of the registration wizard, click on *Activate this Product by e-mail* at the bottom of the screen.

b) Enter the serial number, your name and your e-mail-address.

c) Click on „Request Unlock Key by E-Mail“.

⇨ The registration assistant now generates an e-mail to Kaleidoscope containing the required information. Kaleidoscope will then generate an "unlock key" and mail it back to you.

d) Restart Excelling and then click on *Activate* again.

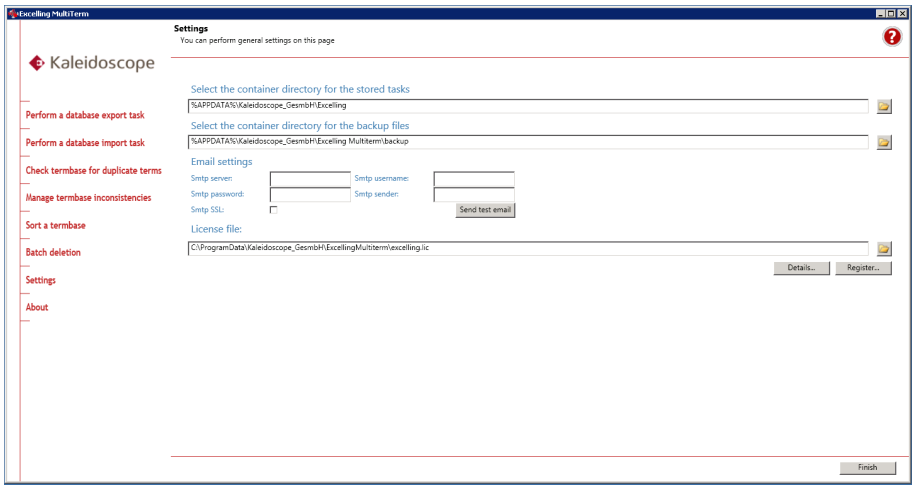
⇨ A dialog box will appear asking for your activation code.

e) Enter the unlock key you have received and click through the remaining steps of the wizard with Next.

⇨ Excelling MultiTerm has now been activated.

2.4 Settings

Several base settings can be defined, depending on how you will want to use Excelling MultiTerm. These settings can be done on the Settings page:



Settings Page

Depending on the security configuration of your system, it might be necessary to start Excelling MultiTerm with administrative rights in order to set up these settings.

The possible configuration includes the following settings:

- Directory for task definitions: Lets you specify a directory where export- and import task definitions are stored. By default this is the subdirectory "settings". However, if you work in a network, it might be useful to set up a shared folder and store your settings there. This way all users can access all task definitions.
- Directory for backup copies: Several tasks provide an optional backup of the database before changing termbase content. This backup copy will be stored in the directory specified here. The default setting is the subdirectory "backup", but you can select any other path, as well.

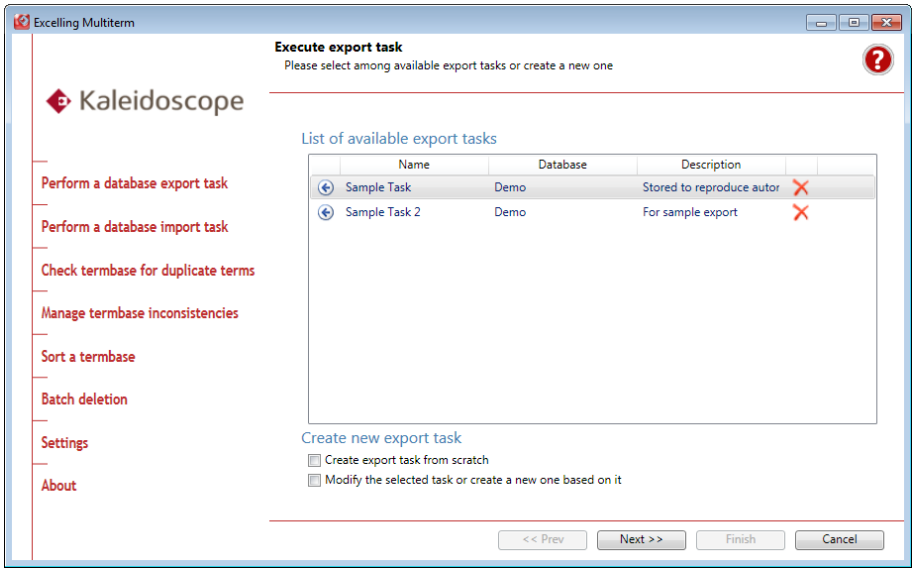
- E-Mail Settings: When using Excelling MultiTerm in Batch Mode (see Command-line Operation [→ 58]), then you can receive automatic mails when these tasks are processed. You can use this setting to define your mail server access. You can test your settings immediately by using the "Send Test mail" feature.

3 Export

Excelling MultiTerm automatically creates an Excel-file during export.

In Excelling MultiTerm, exports are processed using so-called "export tasks." These tasks specify which data will be exported from which termbase. Using these tasks, you can repeatedly carry out an export. For your first export, you must create a new task.

To do so, first click on "Perform a database export task". The main screen of this module pops up:



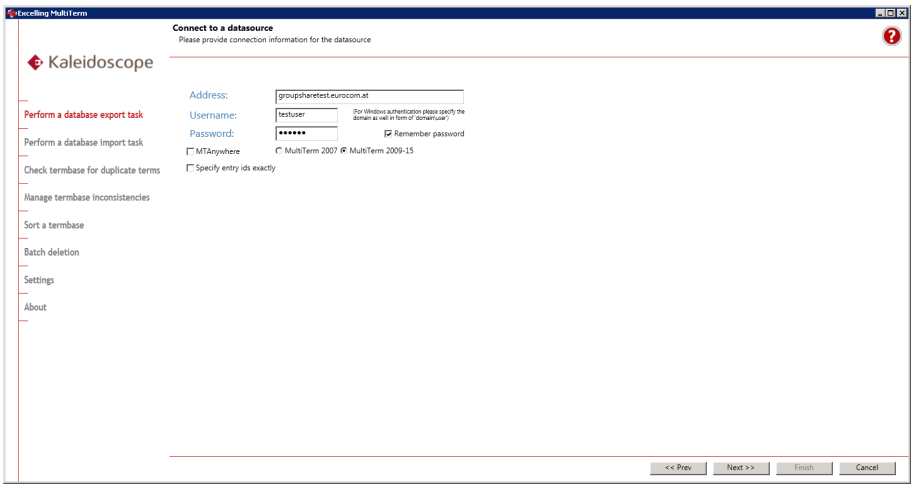
Export: Main Screen

In this screen, you see all export tasks that already exist and can perform the following functions:

- To create your first task or a new task, check "*Create export task from scratch"* and click on "*Next*."
- To delete an existing task, click on the red "X" next to the task. This only deletes the definition of the export but not the exported files. You can still import these.
- To perform an existing task, select the task and click on "*Next*".
- To modify an existing task or create a new one based on it, check "*Modify the selected task or create a new one based on it*" and click "*Next*."

3.1 Connect to a Data Source

The first step will establish a connection to the data source. You will have to specify whether you are connecting to a local termbase (i.e., existing on your computer), a LAN termbase (i.e., existing on a MultiTerm server in the company network) or an Internet termbase (i.e., accessible on the Web via MultiTerm Anywhere on an Internet server).



Defining a Termbase Connection

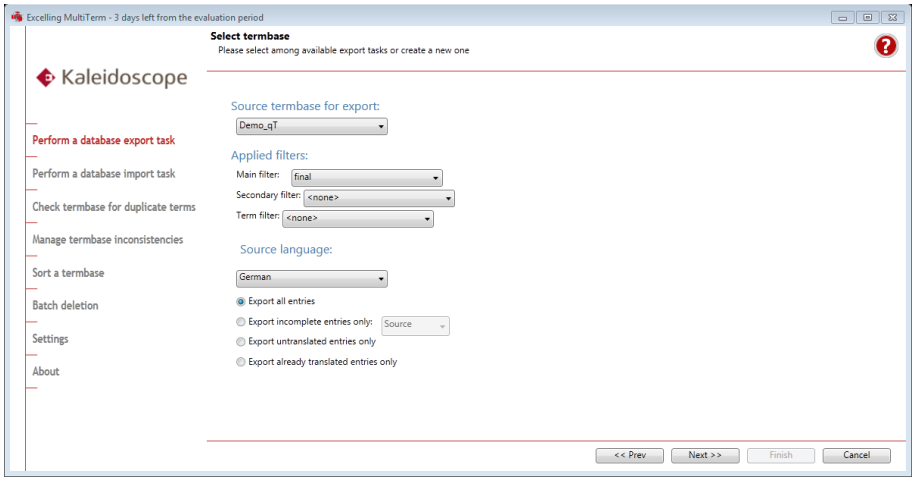
- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."
- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on "*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

3.2 Specify Export Source and Filter

With a successful server connection, the available termbases and different filter criteria are listed in the next dialog box.



Export: Source and Filter

Here you can now set the following options:

a) With "*Source termbase for export*" you can select the termbase from which you would like to export.

b) With *"Apply filter"* you can select a MultiTerm filter to apply to your data. This filter gets applied during export. You can also define a *Secondary Filter* from MultiTerm. This secondary filter will be applied together with the main filter during export. Both filter criteria must be met in order for the entry to be exported, the main AND the secondary filter.

c) Below the MultiTerm filters you can also define *term filters* which will work on the term-level. These filters are not from MultiTerm, because MultiTerm only supports filters on entry level. These filters are added by Excelling MultiTerm and allow you to filter individual terms within an entry. For example: If you set the term filter on field *Usage* equals *Standard*, then only those terms will be exported that contain the value *Standard* in the *Usage* field. If none of the terms in an entry match this setting, then the entry is skipped altogether.

d) With "*Source language*" you can select a language as source language. This language is used for the definition of the "untranslated entries," as well as for the choice of language used for sorting if in the next dialog box the option "*Sort entries before export*" is selected. Also, some MultiTerm filters are based on a switchable "source" language, so in order for these filters to work you also need to supply the respective source language. Filters which refer to a "target" language are not supported in Excelling.

e) With "*Export all entries*" all entries are exported which apply to any filter selected.

f) With "*Export incomplete entries only*" only those entries are exported that are "incomplete" for Excelling MultiTerm:
Unlike MultiTerm, Excelling MultiTerm dynamically defines what "incomplete" means. This is done together with the field selection in the next dialog, where you can set the fields to be exported. In Excelling MultiTerm, incomplete means that at least one of the fields selected in this dialog box is empty in the entry. Therefore, each export can define a different set of "incomplete" entries.
By contrast, in the MultiTerm filter the definition "incomplete" only includes those entry, where an obligatory field according to the termbase definition is missing.
The check for completeness can be done in the source language, the target language(s) or in all languages.

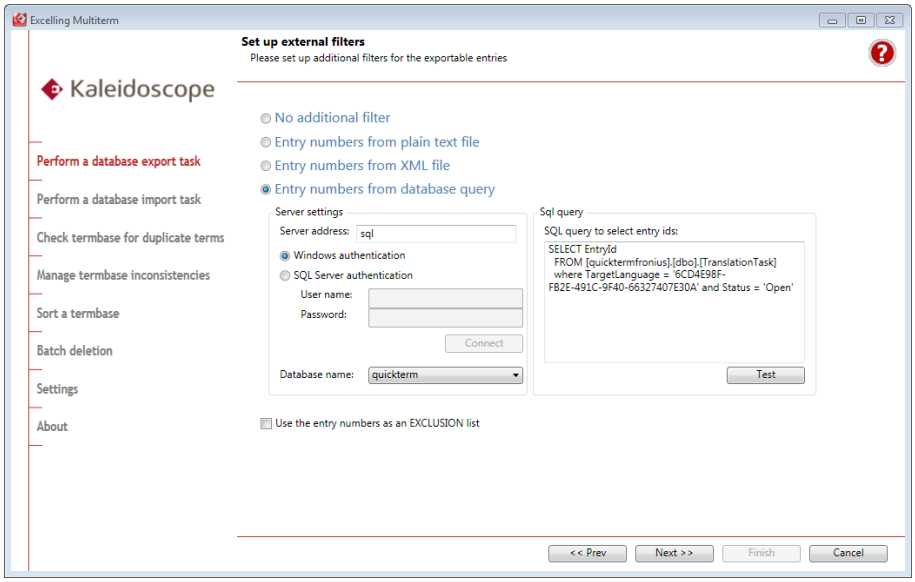
g) “*Export untranslated entries only*" can be used to define that only those entries are exported, which do not yet have a term in the target language(s), in other words are untranslated. The selection of untranslated entries can be done in one or several languages at a time. In the next dialog in this wizard, you will be able to define the languages to be exported. The "target" languages are all languages which are NOT the source language set in this dialog.

h) “Export only translated entries” can be used to define that only those entries are exported, which DO have a term in the target language.

After these specifications, click on "*Next*."

3.3 Using External Sources as Filters

This step allows you to integrate external files and databases to filter those entries that should be exported. These sources include:



External Filters

- Text files which contain the entry IDs to be exported
- XML-files from which you can read the entry IDs by means of XPath statements. This, of course, includes MultiTerm XML files. By using XPatch on exported MultiTerm termbases, you can practically achieve any kind of filtering, even based on dates, nesting information etc.
- SQL queries which return a list of entry IDs to be exported. One typical use case of this option is the integration with quickTerm to export, for instance, all entries that are currently being approved in a certain language.

This is how you can define an external filter source:

a) Select the type of source.

b) Text file: Also define the file which should be read and the separator which separates the individual IDs from one another.

c) XML file: Also define the file which should be read and the XPatch statement that returns the entry IDs from the file.

d) Database: Also define the database connection and the SQL statement which returns the entry IDs.

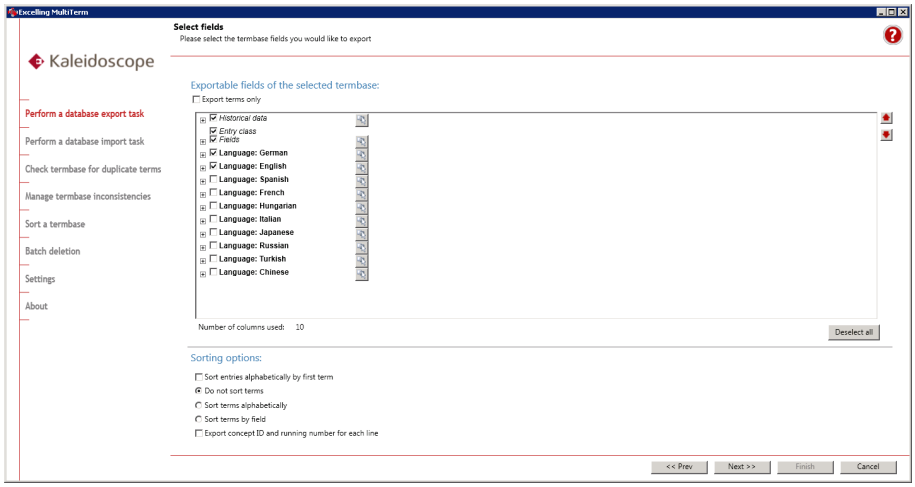
e) In either case you can klick on *Test* in order to test the query you have setup up. The test returns the list of entry IDs which would be filtered.

f) At the end, you can also select the checkbox telling Excelling MultiTerm to use the defined filter as an EXCLUSION filter. This means that it would export all entry that do NOT match the filter.

Once you are done, click on Next.

3.4 Defining Fields and Sort Order

In this step you can select which fields from the termbase will be exported.



Export: Specify Fields

- Option "Only export terms".

  If this option is selected, you can only export terms and you will only be able to select which languages to export.

Choosing Fields for Export

In the tree structure you can activate and deactivate any field.

- The tree "*Historical Data*" includes the processing information (creation date, etc.) from MultiTerm. If you select these fields, this data will be exported for all fields with history.
- Click on *Entry Class* if you also want to export the entry class, in case you are using this MultiTerm feature.
- The tree "*Fields*" contains the fields on the entry level.
- When a field is activated or deactivated on the top level, the entire substructure will be activated or deactivated automatically. By clicking on "*Deselect all*" you can set all fields to not be exported.

Special Features for Field Selection

- By clicking on "*Select field*" you can select all fields in a tree, meaning for instance all language-level fields, or all term-level fields.

- By clicking on *Optimize column width* you can choose to automatically scale the column in excel to the longest field value exported in this column. This can make sense for certain values such as a status value. However, it makes no sense to optimize for instance a "definition" column, since it might be extremely wide in Excel.

Sorting Entries and Terms

By default, all entries are sorted in the chronological order of their entry number. Languages are sorted alphabetically depending on their ISO code. Terms are sorted exactly in the order in which they appear in the MultiTerm entry itself.

You can change this sort oder in various ways:

- You can sort all entries alphabetically by clicking on "Sort entires alphabetically by first term". This sort oder uses the "first term" of each entry to determine the alphabetical sequence of the entries. By default, the "first term" is the one that is all the way to the top of each language in MultiTerm. However, you can change this sort order to move certain terms to the top of each language (see below).
- You can sort the order of the languages in the Excel file by selecting a language and moving it up and down with the arrows at the right side. This can be useful if you are translating from a specific language and want this language to be all the way to the left in Excel (thus on top in the tree).
- You can use three approaches to sort the terms within each language:
  - Do not sort terms means that the terms appear exactly in the order in which they are created in the MultiTerm entry.
  - Sort terms alphabetically means that the terms within a language are sorted alphabetically.
  - Sort terms be field allows you to define a "preferred" term based on a certain field and value. To do this, click on "Sort terms by field", choose the field and then enter the required value. Several values can be entered by separating them with a a semicolon.
    For example: Suppose you have 4 terms in the language German. Only one of them has the *Usage* field set to Standard. You can make sure that this term is exported as the top term. You do this by selecting "Sort terms by field", then choosing the field *Usage* and

selecting the value Standard. You simply choose the relevant field and enter the relevant values, separated by a semicolon if there is more than one value

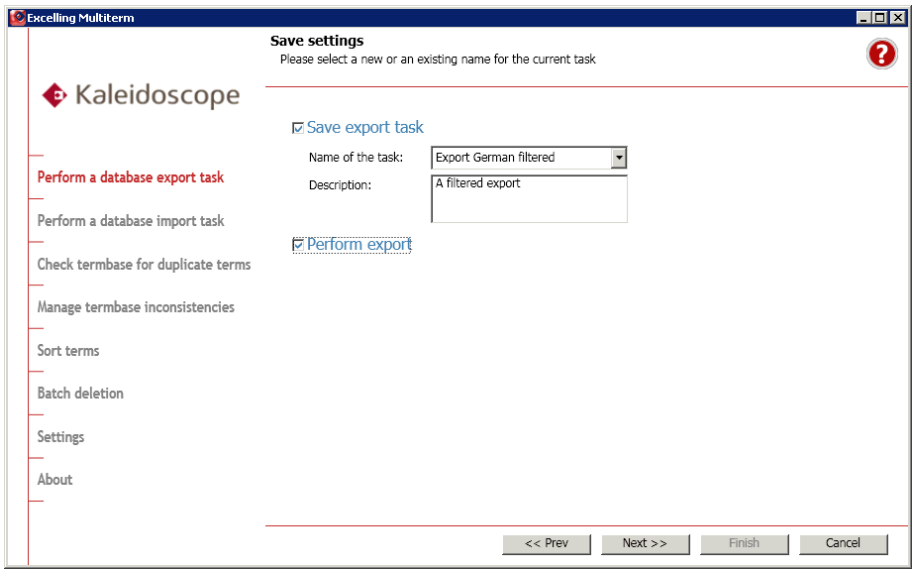
After these specifications, click on "*Next*."

Counter for sorting Excel file

Experienced users can click on "Export concept ID and running number for each line" in order to generate an additional column in the Excel file containing a sequential numbering. These exported counters are just an aid for users to restore the original order of lines if it has been changed manually. Typically, please use the export without counters.

3.5 Save and Run

In the last step, you can now save your selected settings as a task to be re-run at a later time or to run it only once and not save it:



Export: Save and Run

a) Click on "*Save task*" to save your settings and enter a name and a description. Your saved export settings will be stored in the subdirectory “Settings.” This subdirectory can be modified during installation or in the file `config.ini`.

b) To perform your export task, click on "*Perform export*." Then click on "*Next*".

c) A dialog box opens where you can specify the storage location and the file name of the Excel file to be created. Information about structure and use of the Excel file is found under Excel file.

⇨ The export will now run. Depending on the size of the export, this can take several minutes. At the end of the wizard, you will receive a notice if the export was successful.

4 Import

With this module, you can import an exported and edited / translated Excel file back to the original MultiTerm database.

Export termbase is also the import termbase

You can only import into the same termbase from which you exported. By importing into another termbase, it may happen that entries are falsely synchronized, since during import the entry number is used as a synchronization feature. Therefore the target-termbase is hard-wired into the Excel file and you are not prompted to choose one during import.

If you have changed the termbase name or do want to import into a different termbase, you can change this information in the file properties of the excel file. But ATTENTION: The target termbase structure must be 100% compatible with the data structure of the source termbase.

This is how it works:

a) Right click on the Excel file and select *Properties*.

b) Change to the tab *User defined*.

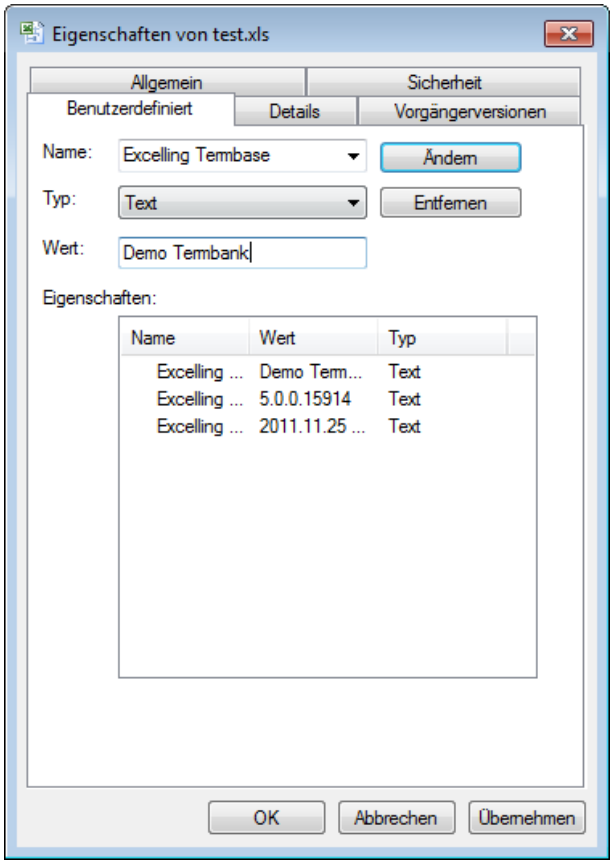
⇨ Here you can see all custom properties of the file.

c) In the list of fields, click on "Excelling Termbase".

⇨ The name and value of the field are now displayed in the editor above.

d) Change the name and click “Apply.”

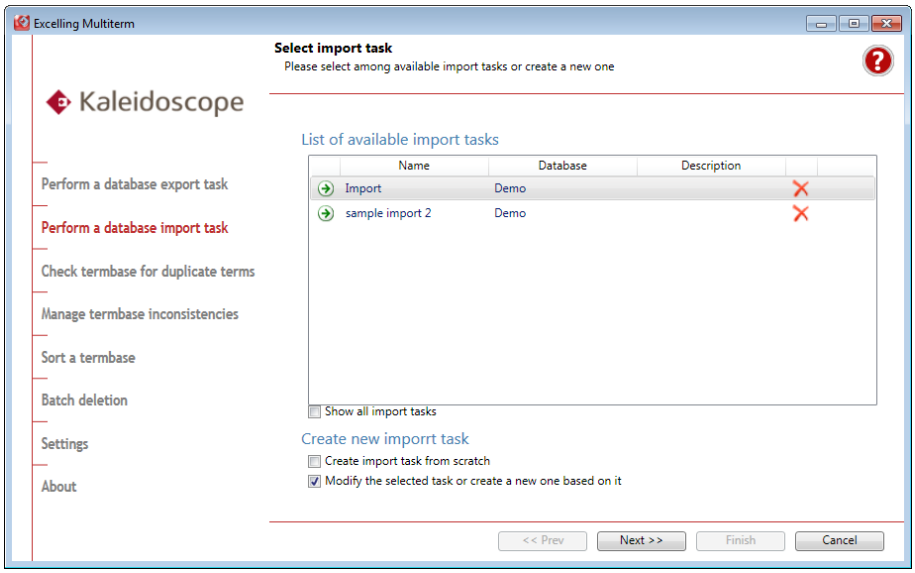
⇨ You can now import the Excel file into the new termbase.



File Properties

Perform Import

To do so, first click on "Perform a database import task." The first step is to select the file you would like to import. Then the main screen of this module pops up:



Import: Start screen

In this screen, you see a list of all available import tasks which match the selected Excel file, and you can carry out the following functions:

- To create your first task or a new task, check "*Create export task from scratch"* and click on "*Next*."
- To delete an existing task, click on the red "X" next to the task. This only deletes the definition of the import but not the exported files. You can still import these.
- If you would like to see all tasks, including those that do not apply to the selected file, click on "*Show all import tasks*." That can, for example, be helpful if you would like to use an existing task as the basis for a new one.
- To perform an existing task, select the task and click on "*Next*".
- To modify an existing task or create a new one based on it, check "*Modify the selected task or create a new one based on it*" and click "*Next*."

Perform Database Backup

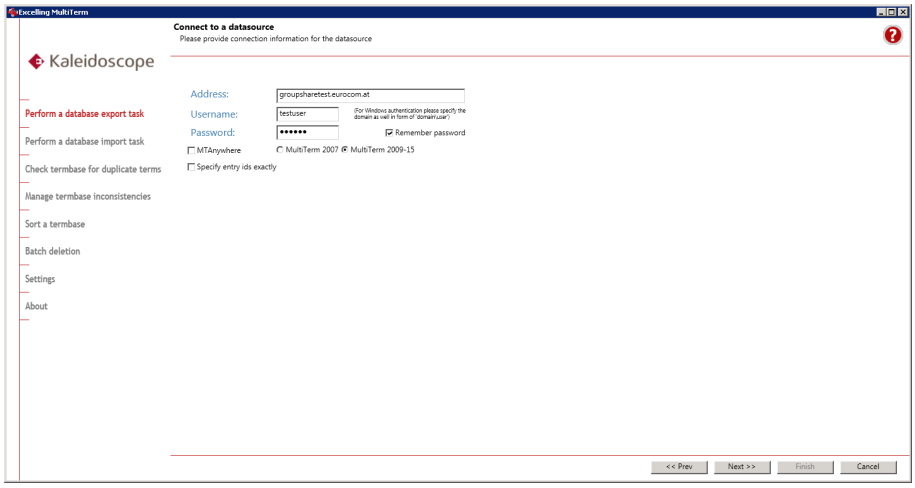
Since some of these features change a lot of entries, it makes sense to perform a backup before running the command. You do this by selecting the checkbox "Database Backup" in the termbase connection wizard. This will carry out a complete default xml export before running the command that follows.

4.1 Connect to a Data Source

In the next dialog box please define first which user will be entered as “change user” in the MultiTerm history of modified entries.

Also, you can select the "Backup database" option for certain operations, if you want to back up the existing termbase before running an import or a maintenance operation. The backup consists of a complete termbase export using the default export definition into a directory which you can define in the settings dialog.

The connection to the termbase will then be established. You will have to specify whether you are connecting to a local termbase (i.e., existing on your computer), a LAN termbase (i.e., existing on a MultiTerm server in the company network) or an Internet termbase (i.e., accessible on the Web via MultiTerm Anywhere on an Internet server).



Defining a Termbase Connection

- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."
- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on "*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- “Change user”

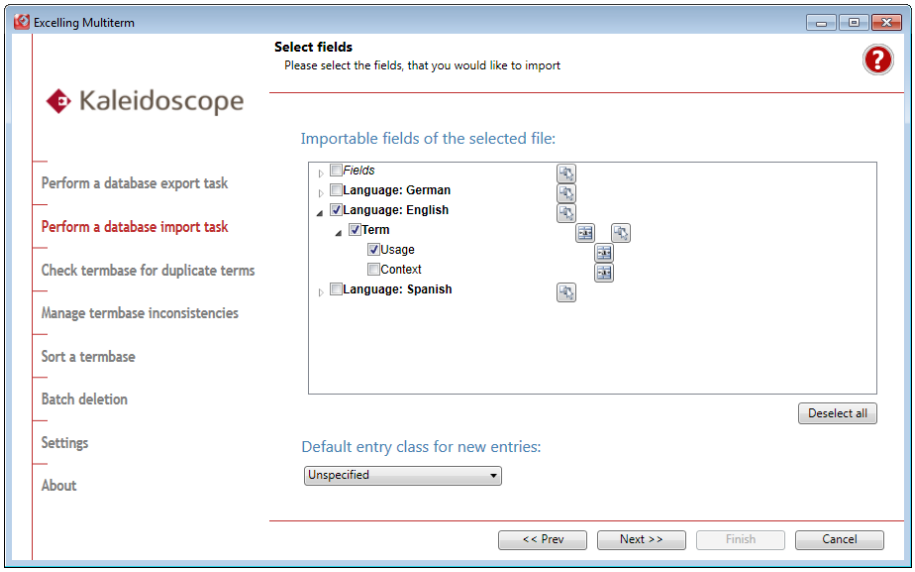
  Please define which user will be entered as “change user” in the MultiTerm history of modified entries.
- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

4.2 Specify Fields

Excelling MultiTerm now reads the fields contained in the Excel file and offers these fields for selection in a dialog box.



Import: Specify Fields

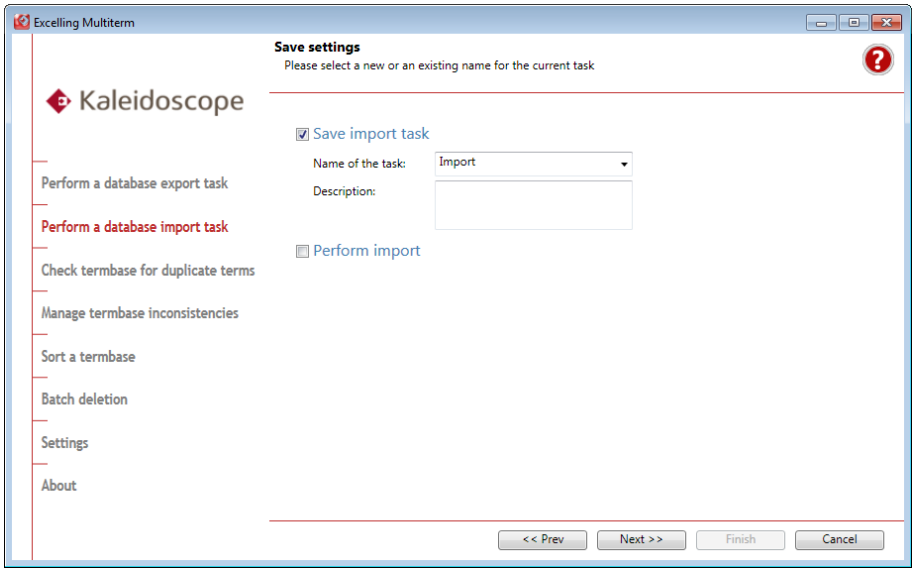
Now you can specify which fields from the Excel file you want to import into MultiTerm and which fields you want to exclude. You can do so by simply activating or deactivating a field in the tree structure. When a field is activated or deactivated on the lowest level, the entire substructure will be activated or deactivated automatically. For example, if you are dealing with a translation project, you will probably de-select the source language from the list.

If your termbase is server-based, you can also specify the entry class of any new entries to be created.

Then click on "*Next*".

4.3 Save and Run

This step allows you to save your settings as a task to be re-run at a later time or to run it only once and not save it.



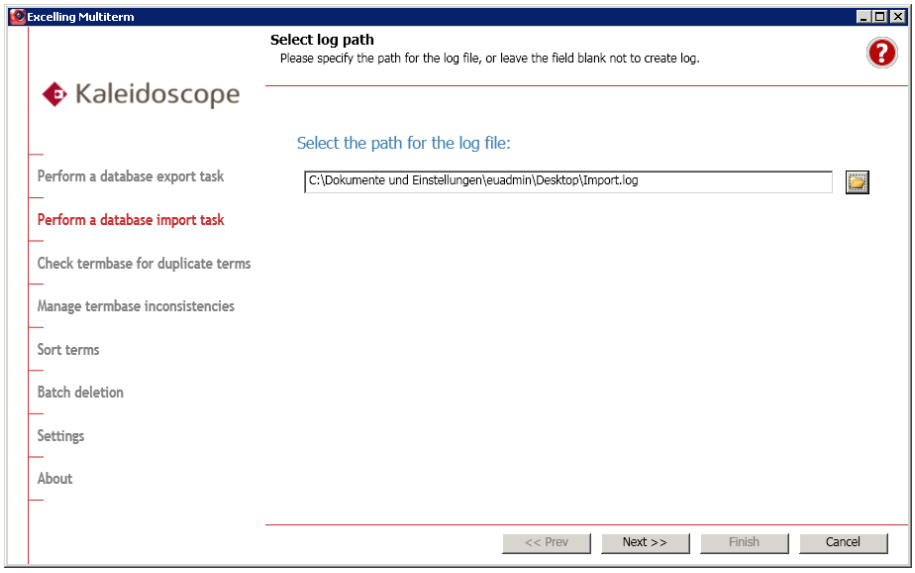
Import: Save and Run

a) Click on "*Save task*" to save your settings and enter a name and a description. Your saved import settings will be stored in the subdirectory “Settings.” This subdirectory can be modified during installation or in the file `config.ini`.

b) To perform your import task, click on "*Perform import*." Then click on "*Next*".

4.4 Log File

This step tells you how to create and maintain a log file. As a general rule, this is useful if you want to trace what happened during import or where there is an error in the Excel data.



Import: Log File

The log file contains the following information per entry:

- Which entries were modified.
- Which entries were not modified.
- Which entries required a user intervention and what sort of intervention it was.
- The end of the log file contains a statistic on imported entries so you can verify whether it is complete.

Then the import starts.

Entry cannot be saved. It contains duplicate terms.

If you find this error message in the log file, it is a result of the MultiTerm API error that occurs when several identical terms exist in the same entry. To fix this error, use the Excelling MultiTerm feature “Check Termbase for duplicate terms.” For further details, please consult the relevant section.

4.5 Details on Import

Checking field values

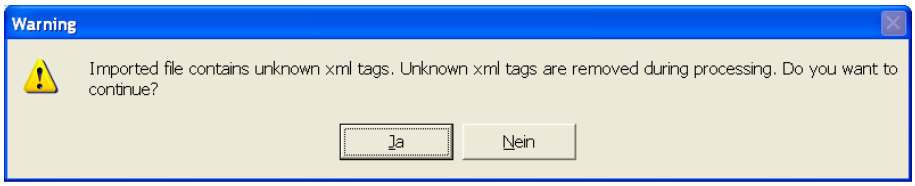
During import, Excelling verifies that the values in the Excel file are valid in MultiTerm. This prevents importing invalid data. The checking process involves the following checks:

- Only allowed values are imported for boolean and pick list fields.
- Text fields can only be imported more than once if the termbase definition allows for multiple fields.
- Boolean and pick list fields may not be used twice. Instead, several values can be separated by using the pipe symbol (|) within the respective column in Excel.
- When errors occur, these are written to the log file. The import then continues with the next line in Excel.
- Nested fields can only be filled if the parent field also contains a valid value.

XML Tags in the Import Data File

If the Excel file contains forbidden XML characters (<, >, & etc.), then these will be encoded automatically by Excelling (< etc.). Otherwise MultiTerm will report an error upon import. The only instance where these special

characters are not encoded are <XREF> Tags, since these are used for links in MultiTerm. If Excelling runs into a problem during encoding, then an error will be shown and the respective characters can be deleted.


Warning
Imported file contains unknown xml tags. Unknown xml tags are removed during processing. Do you want to continue?
Ja
Nein

Error message caused by XML tags in Excel

The import file is also XML-validated before the import, to avoid messy XML code from entering the termbase.

Blank Lines in Excel

If blank lines are present in the Excel data file, Excelling MultiTerm supposes this to be the end of the data file and issues a corresponding notice:

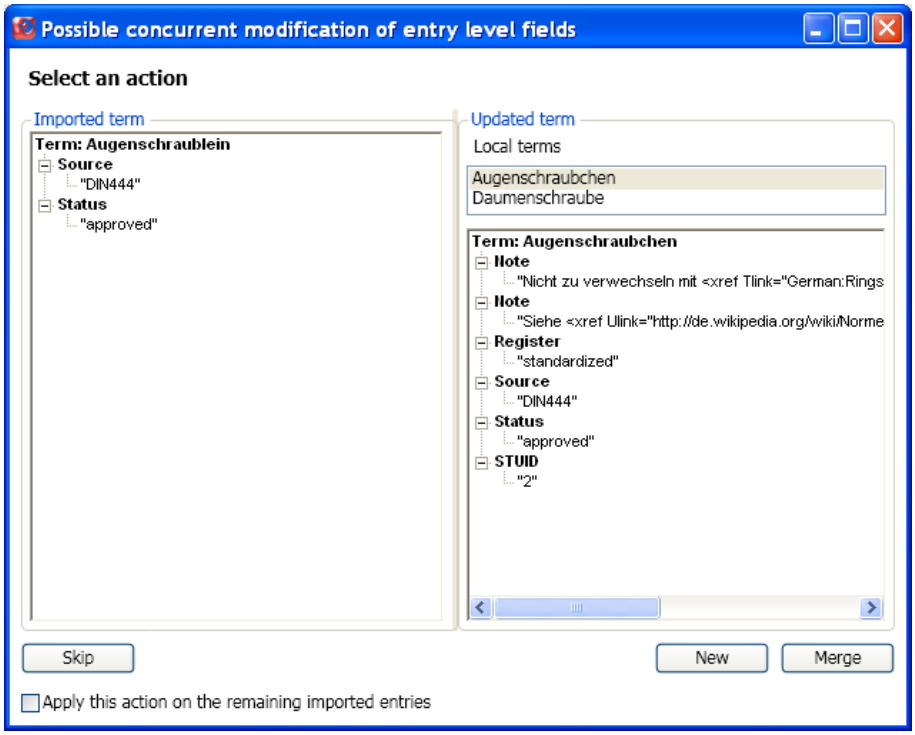
Question
An empty line in the input document has been reached. Check the following next 10 lines for additional entries?
Ja
Nein

Message: End of file

If you select “Yes,” Excelling searches downward for another 10 lines to see whether further entries may be present. If Excelling MultiTerm finds no further lines or if you select “No,” the import will be completed and the log file created.

Simultaneous Modifications

When entries are modified in MultiTerm directly while an export file is being changed as well, and if these entries are now to be imported again via Excelling, we call this a “simultaneous modification.” In this case, the dialog box `Simultaneous modification of fields` pops up:



Simultaneous Modifications

In this dialog box, the entry in the Excel data file appears on the left while the entry from MultiTerm is on the right. This simultaneous modification can have occurred on the entry level or on the term level. Accordingly, the dialog box looks slightly different: If the simultaneous modification occurred on the term level, you can select one of several terms of the existing MultiTerm entry on the right. After that, you have several options:

- By choosing *Skip*, you can skip the import of this term or the entry-level fields and thus leave the entry in MultiTerm as is.
- By choosing *Merge*, you can add the additional fields from the Excel data file to the MultiTerm entry or, alternatively, overwrite the data in MultiTerm with the data modified in the Excel data file. When modifying on the term level, you can first select the respective term on the right and then add these modifications to your term via Merge.
- By choosing *New*, you can create an entirely new term or entry.
- By clicking on the "*Apply this action on the remaining imported entries*" you can make Excelling MultiTerm use your conflict resolution option (Merge, Skip, New) for all remaining conflicts during the import. Please only use this option if you are absolutely sure that this applies to all conflicts in the Excel file.

Technical Information about the Import

Modified Terms - Hash Codes

In order to distinguish during import, whether a term not yet present in an entry was newly added or rather modified, Excelling MultiTerm generates so-called “hash codes” during export, although this code stays hidden. A new hash code will be generated during import and compared with the one in Excel. If it is different, it means that the term was modified. In this case, Excelling MultiTerm can also change the actual term in MultiTerm.

a) Absolutely never modify the column containing the hash codes!

Color-coding not relevant for import

Excel lines are color-coded only to help the user navigate more easily. Color-coding is utterly irrelevant to the process of data import.

Deleting Terms

If you want to delete an individual term from an entry, then do not simply delete the line from the Excel file. During import, this data is not read (because it does not exist) and thus nothing happens. If you do want to delete a term, proceed as follows:

a) Change the term to a specific, unique value, for instance "deleted".

b) Import the Excel file:

   ⇨ In MultiTerm the term is now changed to "deleted".

c) Now switch to the screen "Batch deletion" in Excelling MultiTerm. Here you can tell Excelling MultiTerm to delete all terms that equal "deleted".

Phantom Terms in the MultiTerm Browse Pane

After import, depending on your MultiTerm version, you can sometimes see the old term still listed in the alphabetical list. This is caused by the Fuzzy Index not having been rebuilt during import. To rebuild it, the termbase first needs to be reorganized. Afterwards, the updated terms will appear in the MultiTerm list as well.

5 Excel File

5.1 Data Structure

The Excel data file, where you can process termbase entries, consists of a simple, logical structure to be described as follows.

	A	C	D	F	G	H	J	K	L	M
1	**Source**	Demo Termbase								
2	**Export**	2009.06.29 11:42:31								
3	**Version:**	3.0.3466.22936								
4										
5				**German**				**English**		
6	**Concept**	**Definition**	**Source**	**TERM**	**Source**	**Status**	**TERM**	**Source**	**Status**	**Regional usage**
7	2			Augenschraube	DIN444	approved	eye bolt	DIN444	approved	
8				Daumenschraube	Klaus Fleischmann	rejected				
9	3			Ringschraube	DIN 580 C 15	approved				
10	6	einer zuvor gespeicherten Nummer dient. Die gewünschte Telefonnummer		Direktwahl	Einzelhandel	rejected	lazy dial	cell phone guide	rejected	
11				Schnellwahl	Klaus Fleischmann	approved	quick dial	Product management 2007 05	approved	
12				Zielwahl	Klaus Fleischmann	approved	speed dial	Klaus Fleischmann	approved	
13	10	Eine Welle ist das		Welle	Mechanische	approved	shaft	mechanical contruction manual	approved	
14	11	##		Welle	Klaus Fleischmann	new	wave	Klaus Fleischmann	new	
15	12	##		Welle	Klaus Fleischmann	new	wave	Klaus Fleischmann	new	
16	18			Dünnbrammenstra	Klaus Fleischmann	new	thin slab casting	Klaus Fleischmann	new	
17	20			Unterglasmarkise	Klaus Fleischmann	new	Subglass blind	Klaus Fleischmann	rejected	
18							Under glass blind	Klaus Fleischmann	approved	

Excel File

Header and Definition of Structure

At the top, the Excel file differentiates between the concept ID (=entry number) and fields at the entry level, as well as the individual languages. The example provides the concept ID and entry level as well as German and English as languages.

In the next line, the entry level and the individual languages are parsed further across the available fields. In the example, no field was exported at entry level. For the German language, not only the term but also its definition with its source as well as the source of the term and the status were exported. The English language option includes an additional “regional usage.”

In the case of so-called “nested fields,” e.g., the field “Definition” with its subordinate field “Source,” the script is represented as follows: Source [Definition]. This means that this column contains the source of the definition.

For all fields that only allow one exactly value, Excel offers a drop-down list in order to prevent invalid data. This is not possible, however, for pick list fields that allow more than just one value. In these cases, the data is checked only during import.

Entries and Terms

Starting at line 6, we get to the actual data. There we have to distinguish between “Entries” and “Terms”:

- An entry corresponds to an entry in MultiTerm; it is thus equivalent to a concept (or “idea”). It can contain several terms.

  So that it can synchronize with the correct entry on import, the entry number is exported along with the remaining data. As additional optical help, every entry alternates between being colored yellow and white. A “color” thus always also corresponds to an entry or concept.

- A single entry can then contain several terms. These are synonyms, alternative usages, spelling variants, or anti-terminology, that were all captured in MultiTerm. In the example, the third entry, Number 428, has 5 variant spellings and therefore 5 lines in Excel.

  This does not mean that this entry has to take up 5 lines in English. It can very well be that an entry has 5 German terms but only a single English term. It is just as well possible, however, that it only has one German but 5 English terms.

  You can add new synonyms in Excel without any difficulty by simply adding new lines and by entering new terms under the respective entry number.

Information about version, export date and termbase name

The information about the source termbase, Excelling version number and export date is written directly to the file properties of the Excel file.

You can only import into the same termbase from which you exported. By importing into another termbase, it may happen that entries are falsely synchronized, since during import the entry number is used as a synchronization feature. Therefore the target-termbase is hard-wired into the Excel file and you are not prompted to choose one during import.

If you have changed the termbase name or do want to import into a different termbase, you can change this information in the file properties of the excel file. But ATTENTION: The target termbase structure must be 100% compatible with the data structure of the source termbase.

This is how it works:

a) Right click on the Excel file and select *Properties*.

b) Change to the tab *User defined*.

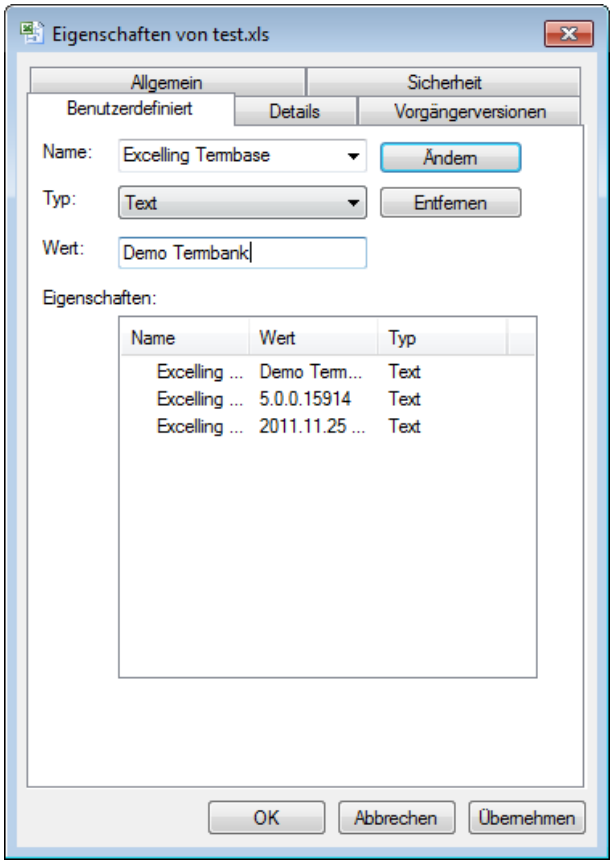
   ⇨ Here you can see all custom properties of the file.

c) In the list of fields, click on "Excelling Termbase".

   ⇨ The name and value of the field are now displayed in the editor above.

d) Change the name and click “Apply.”

⇨ You can now import the Excel file into the new termbase.



File Properties

5.2 Editing Existing Entries

You may edit all existing cells in the Excel data file starting at line 6, excluding the concept ID on the far left. To do so, you simply overwrite the old field with the new value.

Concerning terms, please note that if you modify a term, the old term in MultiTerm will be overwritten with the new term. It may be more useful to switch the existing term to “rejected” and to insert a new term. Please consult with your terminologist on this issue.

Modified Terms - Hash Codes

In order to distinguish during import, whether a term not yet present in an entry was newly added or rather modified, Excelling MultiTerm generates so-called “hash codes” during export, although this code stays hidden. A new hash code will be generated during import and compared with the one in Excel. If it is different, it means that the term was modified. In this case, Excelling MultiTerm can also change the actual term in MultiTerm.

a) Absolutely never modify the column containing the hash codes!

Color-coding not relevant for import

Excel lines are color-coded only to help the user navigate more easily. Color-coding is utterly irrelevant to the process of data import.

Deleting Terms

If you want to delete an individual term from an entry, then do not simply delete the line from the Excel file. During import, this data is not read (because it does not exist) and thus nothing happens. If you do want to delete a term, proceed as follows:

a) Change the term to a specific, unique value, for instance "deleted".

b) Import the Excel file:

⇨ In MultiTerm the term is now changed to "deleted".

c) Now switch to the screen "Batch deletion" in Excelling MultiTerm. Here you can tell Excelling MultiTerm to delete all terms that equal "deleted".

5.3 Creating New Terms

You can also create new terms for an entry in Excel by simply inserting a new line at the end of an entry (and thus before the next concept ID):

	A	C	D	F	G	H	J	K	L	M
1	Source	Demo Termbase								
2	Export	2009.06.29 11:42:31								
3	Version:	3.0.3486.22935								
4										
5				German				English		
6	Concept	Definition	Source	TERM	Source	Status	TERM	Source	Status	Regional usage
7	2			Augenschraube	DIN444	approved	eye bolt	DIN444	approved	
8				Daumenschraube	Klaus Fleischmann	rejected				
9	3			Ringschraube	DIN 580 C 15	approved				
10	6	einer zuvor gespeicherten Nummer dient. Die gewünschte Telefonnummer		Direktwahl	Einzelhandel	rejected	lazy dial	cell phone guide	rejected	
11				Schnellwahl	Klaus Fleischmann	approved	quick dial	Product management 2007 05	approved	
12				Zielwahl	Klaus Fleischmann	approved	speed dial	Klaus Fleischmann	approved	
13	10	Eine Welle ist das		Welle	Mechanische	approved	shaft	mechanical contruction manual	approved	
14										
15	11	##########		Welle	Klaus Fleischmann	new	wave	Klaus Fleischmann	new	
16	12	##########		Welle	Klaus Fleischmann	new	wave	Klaus Fleischmann	new	
17	18			Dünnbrammenstra	Klaus Fleischmann	new	thin slab casting	Klaus Fleischmann	new	
18	20			Unterglasmarkise	Klaus Fleischmann	new	Subglass blind	Klaus Fleischmann	rejected	
19							Under glass blind	Klaus Fleischmann	approved	

Excel: Creating a New Term

In this example, a new Line 14 was inserted after Line 13 (at the entry identified by concept ID 10). This is where you can add new terms, fields, etc. During import, these new fields along with the term itself will be added as a new term (synonym) to Entry 10.

5.4 Creating New Entries

If you want to add entirely new entries with one or more terms, you can insert a complete line and then enter an asterisk (*) in the first column at the point where a concept ID would be:

	A	D	E	F
1	**Source termbase:**			
2	**Export time:**			
3	**Version:**			
4				
5				
6	**Concept**	**TERM**	**Source**	**Status**
7	**2**	Augenschraube	DIN444	approved
8		Daumenschraube	Klaus Fleischmann	rejected
9	**3**	Ringschraube	DIN 580 C 15	approved
10	**6**	Direktwahl	Einzelhandel	rejected
11		Schnellwahl	Klaus Fleischmann	approved
12		Zielwahl	Klaus Fleischmann	approved
13	**10**	Welle	Mechanische	approved
14	**11**	Welle	Klaus Fleischmann	new
15	**12**	Welle	Klaus Fleischmann	new
16	**18**	Dünnbrammenstrangus	Klaus Fleischmann	new
17	**20**	Unterglasmarkise	Klaus Fleischmann	new
18				
19	*	Neuer Term 1	Klaus Fleischmann	approved
20		Neuer Term 2	Klaus Fleischmann	rejected
21	*	Neuer Term 3	Klaus Fleischmann	approved

Excel: Creating a New Entry

The example shows that a new entry with 2 synonyms (*New Term 1* and *New Term 2*) has been added in line 19 and 20. In line 21, a second new entry with a single term (*New Term 3*) has been added.

During import, an entirely new entry with a new concept ID will be added for this line. New entries, too, can take up several lines, of course.

If you want to create several new entries, then simply insert an asterisk in the concept ID column for every line in which a new entry begins. During import, Excelling MultiTerm will then always add a new entry for any asterisk it finds in the concept ID column. The lines following this new entry will be added to it until a new asterisk or concept ID is found.

Using Excelling MultiTerm for an initial data import

Of course you can use Excelling MultiTerm also to do an initial data import or a batch data import. This is how it works:

➢ You have created a termbase in MultiTerm.

a) Define a MultiTerm filter which does not select a single entry (for instance entry number = 0).

b) Now export the termbase with Excelling MultiTerm using this filter.

⇨ You will get an empty Excel file which you can use as a template to fill with data.

6 Additional Features

Certain maintenance tasks are handy in order to ensure consistency of the data in MultiTerm, particularly before or after running batch exports and imports. Excelling therefore provides the following set of additional features:

- *Check for Duplicates:* You can either check for duplicates in all languages at once, or you can check duplicate synonyms withing a single entry and language.
- *Clean out wrong data from entries:* Sometimes invalid data enters a termbase, for instance during an invalid import. This includes for instance invalid field names or field values. Or a language is imported as DE-AT, but should be DE-DE according to the termbase definition. These "errors" go unnoticed, until you want to edit that entry. Strange things will then occur in the application.
- *Sorting terms:* For logical reasons, but also for technical reasons during filtering, it makes sense to have the preferential terms on top of each entry. In addition, you might sometimes want to change the sequence of fields within an entry. Both can be done automatically in an entire termbase with the *Sort Terms* feature.
- *Deleting specific content with a batch command*: Particularly during mass data import, things can go wrong. And then you sometimes want to delete all entries that match a certain filter, or delete entire languages or individual terms or fields.
- *Command-line operation*: Once export and import tasks have been set up, you can use Excelling MultiTerm via the command line, thus enabling you to fully automate exports and imports. Using the Windows task planner you can for instance run automatic exports every Sunday at 22:00.

6.1 Check for Duplicates

Duplicate synonyms in a single entry

It is possible in MultiTerm (before 2011) to insert two identical terms in one entry within a single language. This does not make sense, but it goes unnoticed during normal termbase use, until you want to edit one of the two terms. In MultiTerm itself, this does not become a show stopper.

During automated processing via the MultiTerm API, however, such an entry causes a crash of the MultiTerm API. For this reason, MultiTerm contains a special tool by means of which it can check for duplicate terms in a single language per entry.

Run check prior to export!

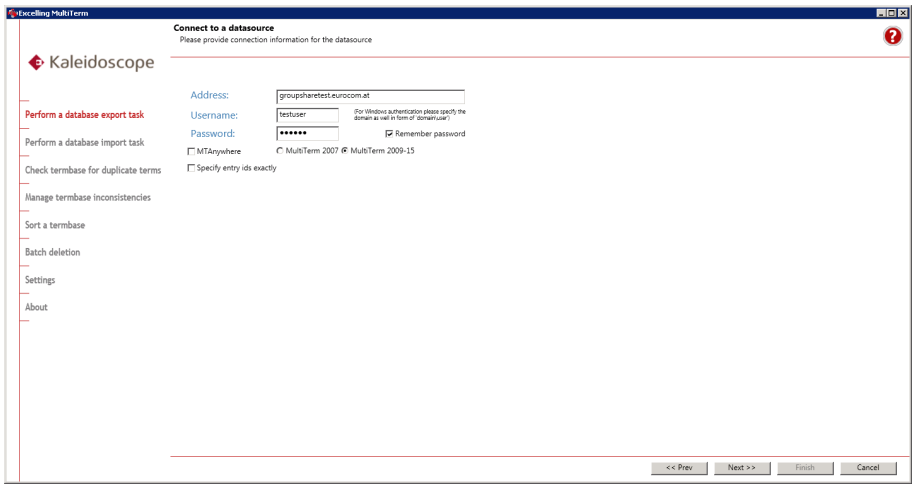
The check for duplicate synonyms should always be run PRIOR to export. If the file has already been exported, it is possible that an entry will not be imported because duplicate synonyms are present. Of course, this is only the case if the exact same language will be re-imported that contains the duplicate synonyms.

Duplicates in all languages

Additionally, it is possible with this tool to check for duplicates in all languages simultaneously. This is especially useful after imports of translations since, sometimes, different terms in the source language can be translated by a single term in one of the target languages. This often goes unnoticed for a while and then is difficult to resolve.

Use

Click on “*Check termbase for duplicate terms*." At first, the dialog box on how to connect to the server pops up:



Defining a Termbase Connection

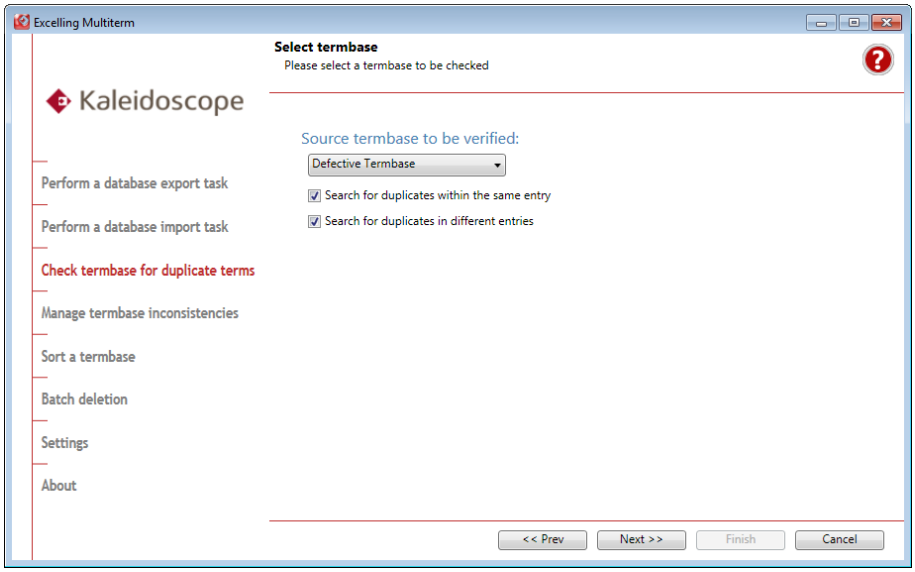
- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."

- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on "*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

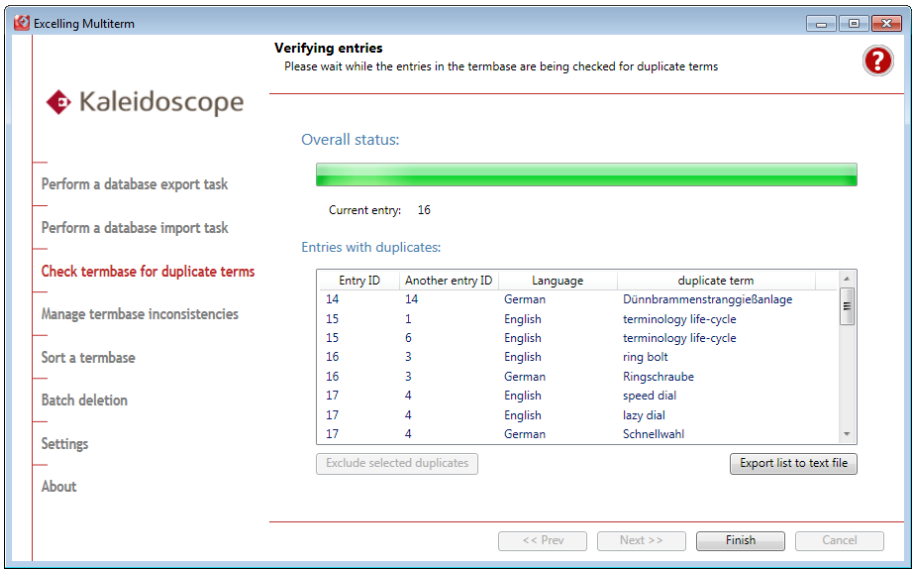
In the next step, you can select which check you want to run for which termbase:



Check for Duplicates: Select Termbase

Select the termbase you want to check. Then specify whether you wish to check for duplicate synonyms only (a good choice prior to your first export) or whether you wish to check for duplicates in all languages (a good choice after a translation import). Then click on "*Next*."

Excelling MultiTerm now searches the termbase for duplicate terms and produces a summary:


Excelling Multiterm
Verifying entries
Please wait while the entries in the termbase are being checked for duplicate terms
Kaleidoscope
Overall status:
Perform a database export task
Perform a database import task
Check termbase for duplicate terms
Manage termbase inconsistencies
Sort a termbase
Batch deletion
Settings
About
Current entry: 16
Entries with duplicates:
Entry ID | Another entry ID | Language | duplicate term
14 | 14 | German | Dünnbrammenstranggießanlage
15 | 1 | English | terminology life-cycle
15 | 6 | English | terminology life-cycle
16 | 3 | English | ring bolt
16 | 3 | German | Ringschraube
17 | 4 | English | speed dial
17 | 4 | English | lazy dial
17 | 4 | German | Schnellwahl
Exclude selected duplicates
Export list to text file
<< Prev
Next >>
Finish
Cancel

Check for Duplicates: Results

You can export this list and then process the relevant entries in MultiTerm.

Or you can click on *Next* and then export the respective term to an Excel file just as you would during a normal Excelling export.

Deleting Duplicate Synonyms

As you will see, it is not so easy to delete a duplicate synonym in MultiTerm within a single language. It may be necessary to first rename one of the two duplicates, for example, by adding a “2,” then save the entry and check if MultiTerm has correctly kept all the fields. After that, enter the edit mode again and delete the duplicate that does NOT contain the fields. The handling of these duplicates in MultiTerm does not work well, and this trick allows you to turn the duplicates in MultiTerm into autonomous terms which can be deleted.

Skipping certain Entries

If you do not want to process certain entries with Excelling MultiTerm, you could also create a field in MultiTerm to store the information that this entry is not valid for Excelling (e.g., “ExcludeExcelling” and value “Yes”). You can then exclude these entries via a filter.

Excluding Homonyms from the Duplicate Search

You might want to exclude certain duplicates (homonyms) from being found as duplicates again and again. Therefore you can exclude these once:

➢ You have performed a duplicate search and have a list of homonyms.

a) Click on the homonym you do not want to be found as duplicate any more.

b) Underneath the list click on *"Exclude selected duplicates"*.

⇨ These duplicates are removed from the list and will no longer be found as duplicates in subsequent searches.

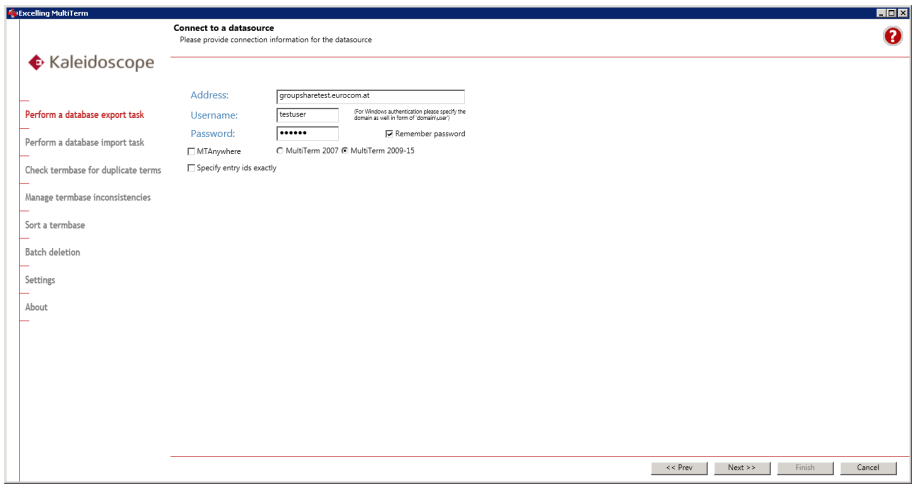
Resetting excluded Duplicates

All excluded duplicates are written to a file called TERMBASENAME.excl in the settings-directory of Excelling MultiTerm. You can edit this list and delete individual lines, or simply delete the whole list. Then these duplicates will be found again.

6.2 Clean out wrong data from entries

Sometimes invalid data enters a termbase, for instance during an invalid import or a flawed migration. This includes for instance invalid field names or field values. Or a language is imported as DE-AT, but should be DE-DE according to the termbase definition. These "errors" go unnoticed, until you want to edit that entry. Strange things will then occur in the application.

In order to batch delete records from MultiTerm, select "*Manage Termbase Inconsistencies*". At first, the dialog box on how to connect to the server pops up:



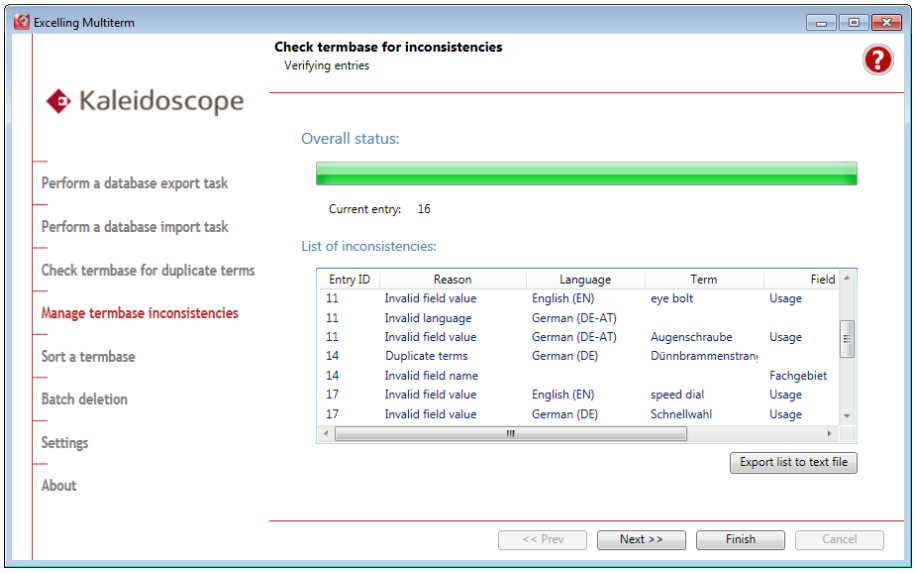
Defining a Termbase Connection

- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."
- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on "*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

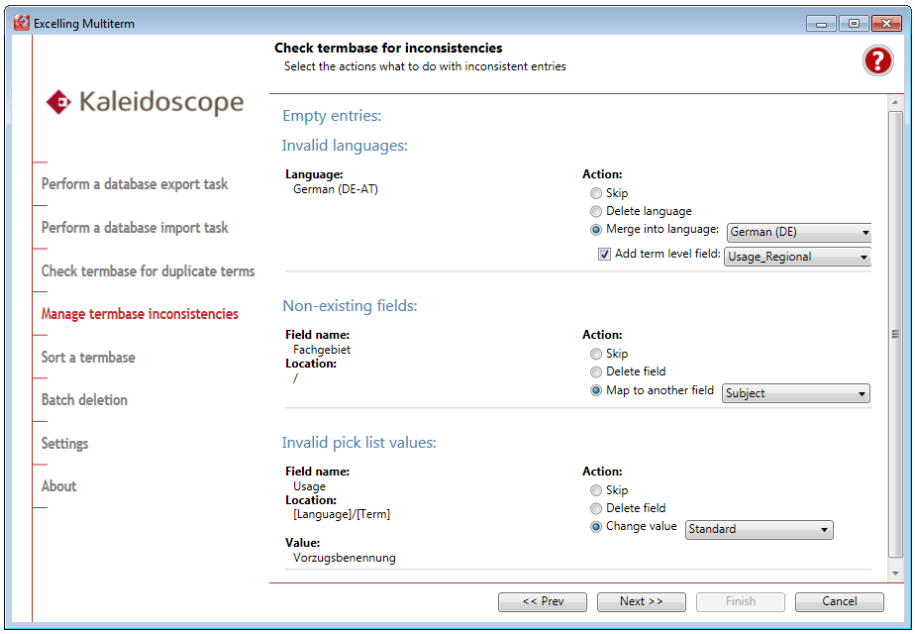
Now you can select in which termbase the consistency check should occur. Excelling MultiTerm now searches invalid entries in the termbase. These are then displayed in a list:



List of invalid entries

You can now export this list as a text file and then edit the entires directly in MultiTerm.

Or you can click on **Next** and fix the respective entries using Excelling MultiTerm. You will receive a listing of all conflicts and can then choose how you want to fix each of them individually.



List of conflicts

This is how it works:

Invalid Languages

For invalid languages you have several possible solutions:

a) You can skip the problem, then Excelling MultiTerm will ignore it and fix the remaining issues.

b) You can completely delete all of these "wrong" language groups. This only deletes all terms and fields on the language level, not the remaining entry.

c) You can map the language to another language. To do so, simply select the correct language from the drop-down list.
When mapping to another language, you can also add an extra field with a specified value so that you can identify these terms again in the termbase later on. For instance, you might want to add a *Note* with the content "*Mapped from DE-AT*". Or you can map the language DE-AT to DE-DE and include a *regional usage* field with the content *AT*.

Invalid Fields

For invalid fields you have several possible solutions:

a) You can skip the problem, then Excelling MultiTerm will ignore it and fix the remaining issues.

b) You can completely delete all of these "wrong" fields.

c) You can map a "wrong" field to its corresponding "right" field.

Invalid Pick list Values

For invalid pick list values you have several possible solutions:

a) You can skip the problem, then Excelling MultiTerm will ignore it and fix the remaining issues.

b) You can completely delete all of these "wrong" fields.

c) You can map a "wrong" field value to its corresponding "right" field value.

Then click on "*Next*". You can now select a log file and then Excelling MultiTerm will start fixing the defined problems.

Afterwards, check the log file for possible errors, such as errors caused by duplicate synonyms in the termbase.

6.3 Sort terms

How MultiTerm sorts Terms

The order in which MultiTerm displays several terms within a language depends on the MultiTerm version number. In newer versions, the search term is always the top term. This does not always make sense. For instance, it might be better to display the preferred term on the top of the list. Starting with MultiTerm 2009 you can change this behavior with an option.

In some versions of MultiTerm, the order of the terms within an entry is also important for the filter function in MultiTerm itself. For instance, you might have a filter set to "*Usage = Standard*", but this filter might only work if the top term in an entry contains the specified field value.

With the Sort Terms feature, Excelling can automatically sort all terms in all entries of a termbase by defining which field and which value determine a preferred term.

How MultiTerm sorts Fields

The sequence of the fields in an entry is not really relevant to MultiTerm itself, but it can be annoying for the user to have a different sequence in each entry. If you use entry models, then most likely all your entries have the same field sequence anyhow. Also, it is possible to influence the sequence in which fields are displayed via the layout. However, it can still happen that you want the fields in an entry to all follow the same sequence.

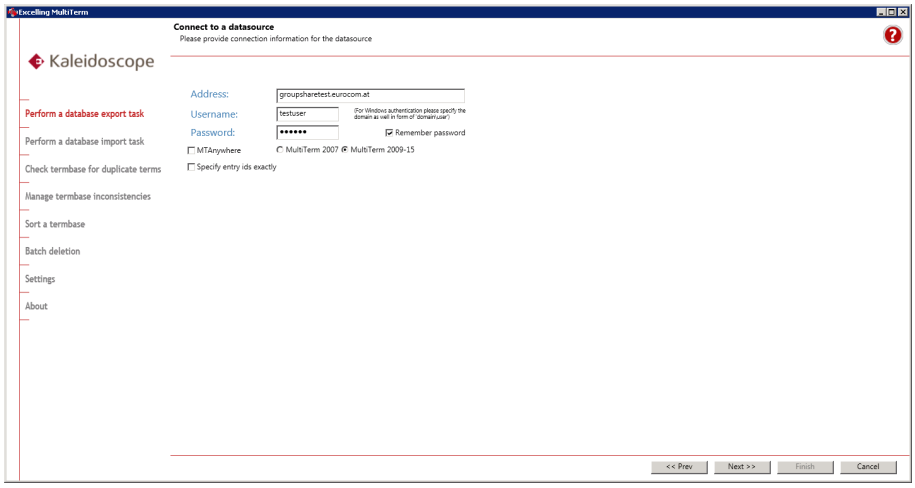
The "real" sequence of the fields is only visible in the editor when you have selected the default full layout.

Perform Database Backup

Since some of these features change a lot of entries, it makes sense to perform a backup before running the command. You do this by selecting the checkbox "Database Backup" in the termbase connection wizard. This will carry out a complete default xml export before running the command that follows.

Use

Click on "*Sort terms*". At first, the dialog box on how to connect to the server pops up:



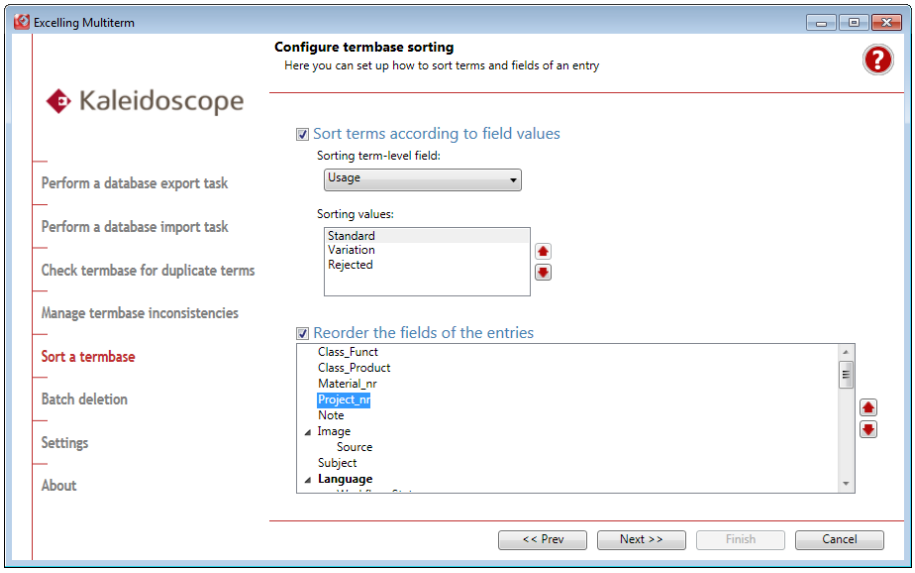
Defining a Termbase Connection

- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."
- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on "*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

In the following dialog you can now define, whether you want to change the sequence of terms, or fields, or both.



Sort terms

Here you can define what you want to sort.

This is how you can sort terms within all entries:

a) Click on "*Sort terms according to field values*".

b) Select the field you want to use as an indicator.

c) Then enter the value which makes it a preferred term. For instance, this could be the field *"Usage"* with the content *"Standard"*.

d) Then click on "*Next*".

⇨ Excelling will now re-sort all terms in all entries according to this specification.

This is how you can sort all fields in an entire termbase:

a) Click on "*Reorder the fields of all entries*".

b) In the field list underneath, sort the terms using the arrow buttons next to them.

c) Then click on "*Next*".

⇨ Excelling will now re-sort all fields in all entries according to this specification.

6.4 Deleting specific Termbase Content

Challenges during mass import

Particularly when editing large amounts of terms, it sometimes happens that you also want to delete large amounts of terms or entries in a single step.

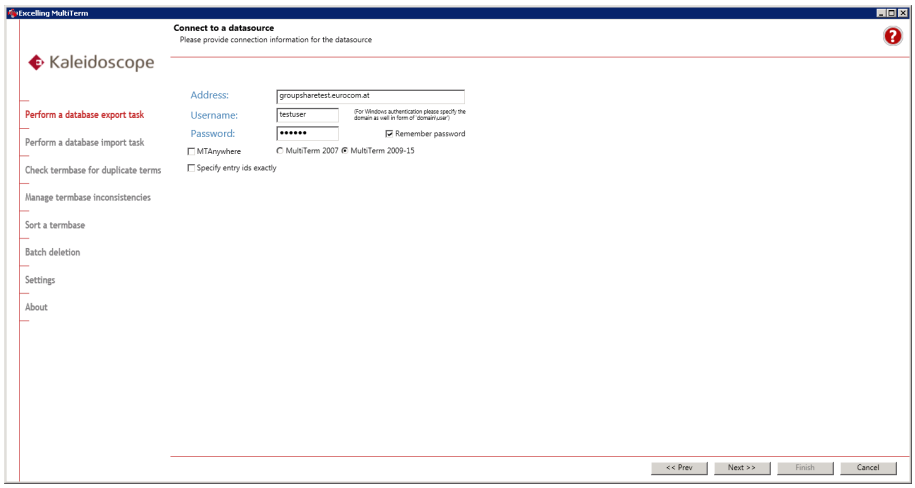
To avoid invalid data altogether, Excelling always allows you to create a backup copy of the termbase before each import or maintenance operation. In addition, Excelling offers the feature to *batch delete* all terms matching a particular filter, or a complete language.

Perform Database Backup

Since some of these features change a lot of entries, it makes sense to perform a backup before running the command. You do this by selecting the checkbox "Database Backup" in the termbase connection wizard. This will carry out a complete default xml export before running the command that follows.

Use

Click on "*Batch Deletion*". At first, the dialog box on how to connect to the server pops up:



Defining a Termbase Connection

- For *local termbases* simply leave all text fields blank (or, if you want to highlight matters for your own use, enter “local host” in the address field) and click on "*Next*."
- For *LAN server connections* enter the server name and the MultiTerm username and password. Then click on "*Next*" As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.
- For MultiTerm 2007 *remote server connections* via the Internet, enter the server address (including http(s):// and including "/mtanywhere" at the end) as well as the MultiTerm username and password. Then click on

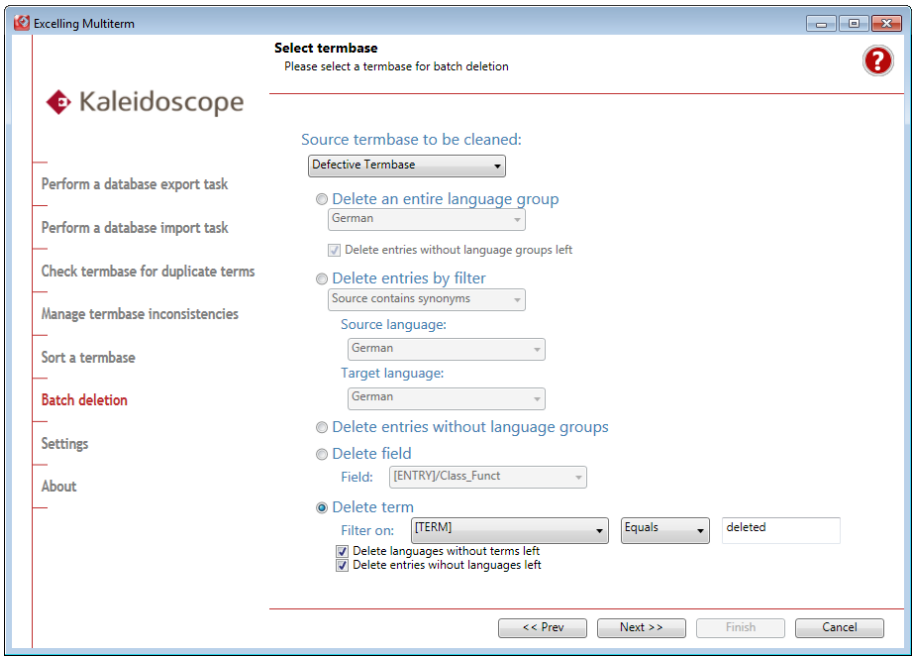
"*Next*". As an option, select "Remember password". Excelling always remembers the last termbase server plus the username. However, the password is only remembered if you chose to do so.

- "Specify Entry IDs"
  By activating this option, you can define a precise list of entry IDs which should be processed with this task.

Database Backup checkbox

For all import and maintenance features the dialog termbase connection also offers a checkbox "Backup target database". Select this option if you want Excelling to execute a complete termbase export before running the import or maintenance operation. The export will be done using the default export definition of MultiTerm.

In the next step you can select which data from the termbase you want to delete:



Deleting Filtered Entries

Deleting an entire language

First, select the termbase you want to delete from.

Then click on "*Delete an entire language group*". Excelling will then show you all languages in the termbase.

You can choose the language you want to delete.

As an option, you can also choose to completely delete all entries in which the selected language actually is the only language. If you do not choose this, then empty entries are left in the termbase, which MultiTerm will not be able to display or edit any more.

Then click on "*Next*". Excelling will now delete this language group from the termbase.

Deleted language

Deleting a language group only means that you delete the content of the termbase for this language. It will not delete the language from the termbase definition. Therefore you can then create entries for that language again or repeat the import with Excelling.

Deleting filtered entries

First, select the termbase you want to delete from.

Then click on "*Delete entries by filter*". Excelling will then show you all the filters in the termbase.

First, choose the desired filter you want to delete matching entries for. Since some filters are built to match a specific source and target language, you can also select these here.

Then click on "*Next*". Excelling will now delete all entries that match the chosen filter from the termbase.

Delete Entries without Language Groups

It can happen that an entry in MultiTerm does not contain any language group any more. These entries are "dead entries", because MultiTerm cannot access or display them any more.

Therefore, you can delete them using this feature.

To do so, select "*Delete Entries without Language Groups*" and then click on Next. Excelling will now delete all entries that no longer have any language group.

Delete a Field

Sometimes you might want to delete a complete field from the termbase. Since you may not change the termbase structure, you need to do this by exporting the termbase, creating a new structure without this field, and then importing the data again. Normally, the field content then gets deleted in the exported xml file. However, this is a cumbersome and error-prone process.

Using the field deletion command in Excelling, you can delete specified fields from the termbase data before exporting it. Of course you can also use this feature to "only" delete the values of a particular field wherever it occurs and leave the field in the termbase structure.

To do so, select "*Delete field*", then select the field you want to delete (on the correct level!), and then click on *Next*. Excelling will now delete this field from all entries in the termbase.

Deleted Field

Deleting a field only means that you delete the content of the field from the termbase. It will not delete the field from the termbase definition. Therefore you can then create new entries using that field. If you want to completely eradicate the field from the termbase definition, you need to delete it first, then export the termbase, create a new one without that field, and re-import the export data.

Delete a Term

You can also delete specific terms from the termbase using Excelling MultiTerm. To do so, you first set up the filter which defines the terms to be deleted. This can be done using the content of the term itself or a particular field on the term level.

To do so, select *Delete term*.

Then chose the field you want to base the filter on.

If you want to filter according to the content of the term itself, choose "Term". Then, next to the field, select "*Contains*", "*Does not contain*", "*Equals*" or "*Does not equal*" plus the value. For instance, you can delete all terms that you have marked for deletion in an Excel file by changing the term to "Deleted". To do so, select "*TERM equals Deleted*"

If you want to filter according to a field on term level, choose the field you need. Then, next to the field, select "*Contains*", "*Does not contain*", "*Equals*" or "*Does not equal*" plus the value. For instance, you might want to delete all outdated terms by selecting "*Usage contains Outdated*".

In addition, you can define the following options before running the command:

- You can delete the complete language group, if the term you delete was the last one in that language. For instance, if you delete the laster term of the German language, then it makes sense to completely delete German from that entry.

- You can delete the complete entry, if the term you delete was the last language group of that entry. For instance, if you have an entry that only has one German term, and you delete that term, then it makes sense to delete the entry altogether.

Then click on "Next". Excelling will now delete the specified terms from the termbase.

6.5 Command-line Operation

In order to automate processes, Excelling MultiTerm can be executed in Batch Mode. With Windows task planner you can, for instance, run a certain set of exports or imports routinely on a certain weekday at a set time.

Syntax for Automatic Exports

Excelling.exe –tasks=“task1;task2“ –output=“targetdirectory“ –email=mail@company.com

The parameters are:

- "Tasks" defines the export or import tasks to be run. You can also define several tasks separated by semicolon. These will then be executed one after the other.
- "Output" defines the target directory for the export and log files.
- "Email" defines an eMail-address to send error messages to. If you do not supply an eMail-address in the call, then the default address from the settings dialog will be used.

Syntax for Automatic Imports

Excelling.exe –import –input="File or path" –tasks="Taskfiles" —email=mail@company.com

The parameters are:

- – import is required to tell the batch command to run an import. Without this parameter, Excelling will run an export. Automatic exports are rather unusual, as a matter of fact. If you do want to set up automatic imports, then you need to include the -import parameter.
- – input defines the Excel file to be imported, or an entire folder in which the Excel files to be imported are stored.

- – tasks defines which import tasks to use. If no import tasks are defined, then Excelling will pick that one which matches the target termbase and import all languages. If more than one import tasks are found, or no import task is found at all, then Excelling MultiTerm writes an error message into the log file.
- "Email" defines an eMail-address to send error messages to. If you do not supply an eMail-address in the call, then the default address from the settings dialog will be used.

Excelling MultiTerm will create a log file for each import. It is stored in the source folder of the Excel file with the same name plus the extension ".log".

Excelling MultiTerm also creates a file "autoimport.lts" in the settings path of the installation folder to avoid redundant imports.

7 Free Express Version

In the free Express Version, targeted particularly towards Freelancers, Excelling MultiTerm offers an express import and export of Excel files containing only terms, no descriptive fields.

If you import an Excel file without a column for the entry number, then each line in Excel will become one entry in MultiTerm, containing all the terms in the separate columns.

You can also use the free express import to import a "real" Excelling file containing an entry ID in the first column, as long as there are only term columns in the remaining file. That way you can run the complete export -> edit -> import workflow with the Express Version of Excelling MultiTerm. You can also synchronize terms with an existing termbase, or you can create new entries with synonyms by using the asterisk in the first column. For more information see Excel File [➙ 37]

These are the steps you need to create a termbase from a simple Excel file using the Express Version:

a) Prepare the Excel file

b) Create a termbase in MultiTerm

c) Import the data using Excelling MultiTerm

See also

Excel File [➙ 37]

7.1 Prepare the Excel File

This is how you prepare the excel file with only terms for an express import into MultiTerm:

- The first line has to contain the name of the languages, one per column.
- Starting with line two, each column contains a term in the respective language The file may include blank cells and even blank lines.
- However, it may not include other data than terms. If you want to import Excel files with descriptive fields, you will need to license your copy of Excelling MultiTerm.

An example:

	A	B	C
1	German	English	Spanish
2	Augenschraube	eye bolt	
3	Ringschraube	ring bolt	
4	Kurzwahl	address book dial	
5	Schnellwahl	speed dial	
6	semiotisches Dreieck	triangle of reference	
7	Apfel	apple	manzana
8	Orange	orange	naranja

Example File for an Express Import

7.2 Create the Termbase

If you do not alread have a termbase, this is how you can create a simple termbase with only terms. Of course you can use your existing or a more complex termbase, as long as at least one language of the Excel file is included in the termbase.

a) Start SDL MultiTerm.

b) In MultiTerm, select *Termbase -> Create termbase*.

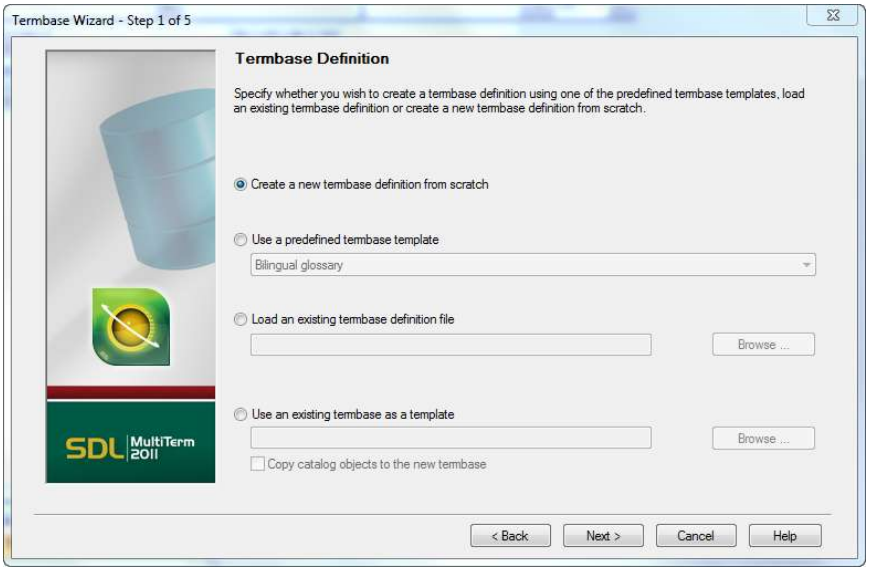
c) Select a location and a filename for your termbase. We recommend you store all databases in one central location, for instance *c:\Trados Data*. You can choose any filename for your termbase, for instance *My termbase*.

d) Click on *Save*.

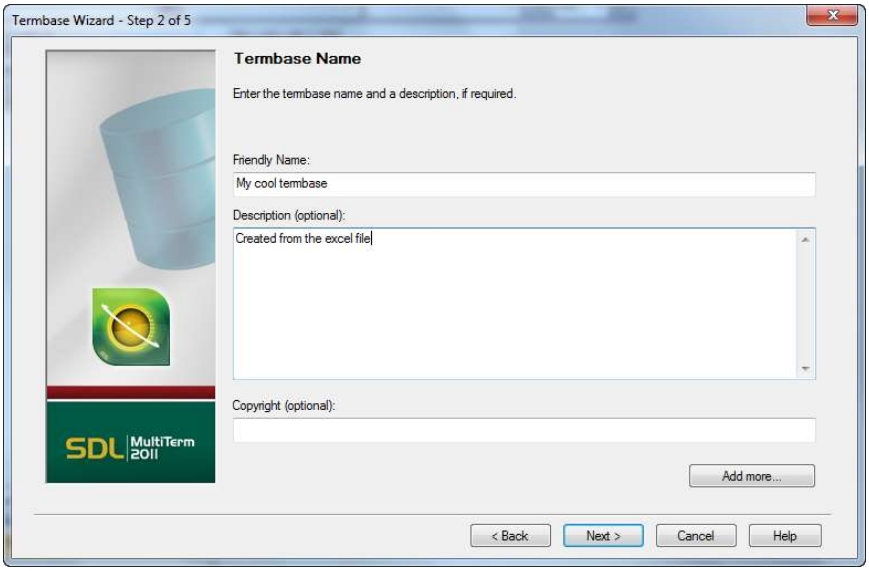
⇨ The start page of the Termbase Wizard will appear.

e) Click on *Next*.

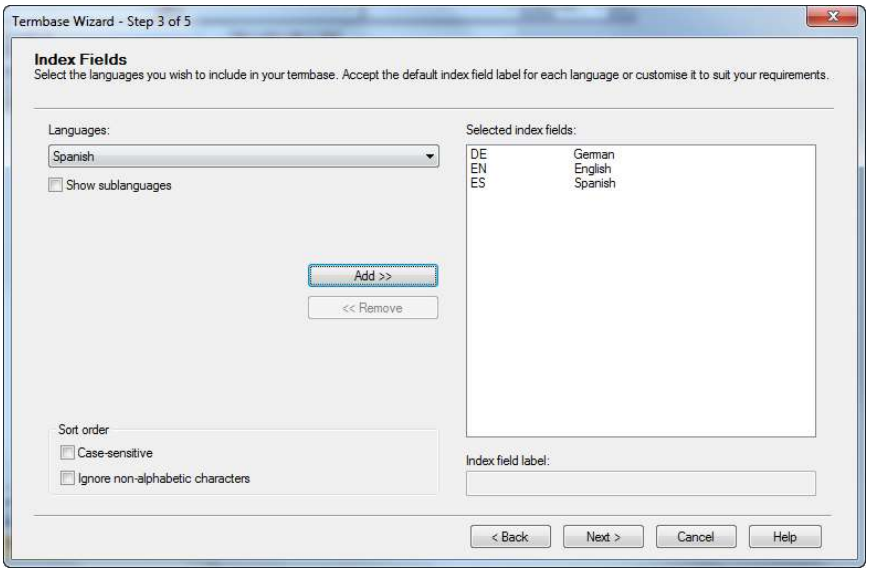
f) Select *create a new termbase definition from scratch* and click on *Next*.


Termbase Wizard - Step 1 of 5
Termbase Definition
Specify whether you wish to create a termbase definition using one of the predefined termbase templates, load an existing termbase definition or create a new termbase definition from scratch.
Create a new termbase definition from scratch
Use a predefined termbase template
Bilingual glossary
Load an existing termbase definition file
Browse ...
Use an existing termbase as a template
Browse ...
Copy catalog objects to the new termbase
SDL MultiTerm 2011
< Back
Next >
Cancel
Help

g) Enter a *Friendly Name* and, if you want, a *description / copyright* for your termbase. This "friendly" name is how you will see your termbase listed in MultiTerm and Studio. It can be different from the filename from the previous step, but of course it can also be the same. Click on *Next*.



h) Select the *languages* you want to include in your termbase on the left side and copy them into your termbase by clicking on *Add*.



i) Click on *Next* until you get to the last step in the wizard.

j) Then click on *Finish*.

⇨ You have now created a new termbase. You can change the definition of your termbase (languages, fields...) later on. However, you can not rename existing fields or languages any more.

7.3 Import the Data

This is how you import your Excel file into your new termbase:

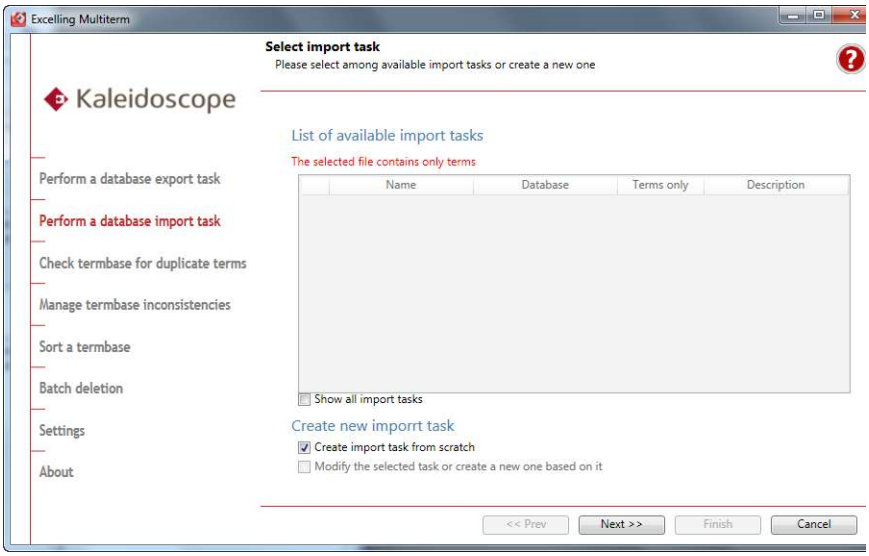
a) Start Excelling MultiTerm.

b) Select *Perform a database import taks*.

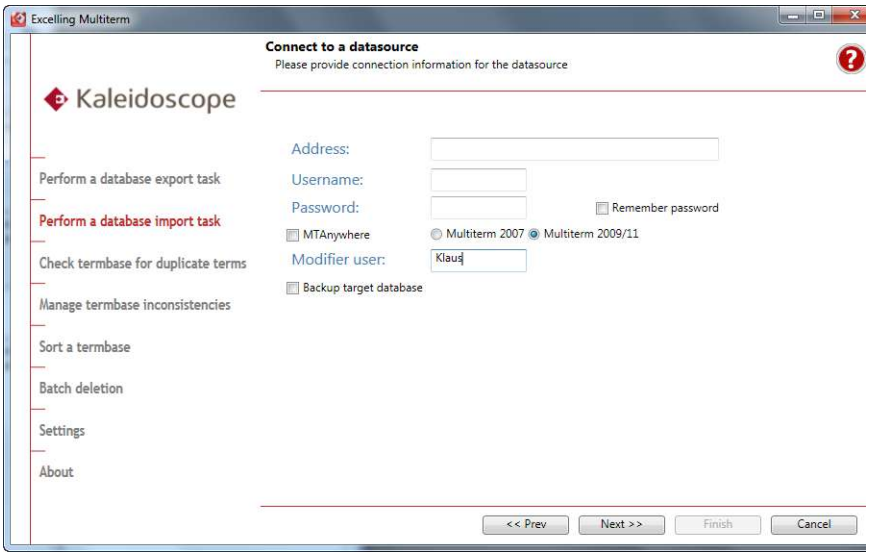
c) Select the excel file you have prepared and click on *OK*.

d) Excelling MultiTerm will automatically see that this is an express file, because it only contains terms. If you want to import Excel files with descriptive fields, you will need to license your copy of Excelling MultiTerm.

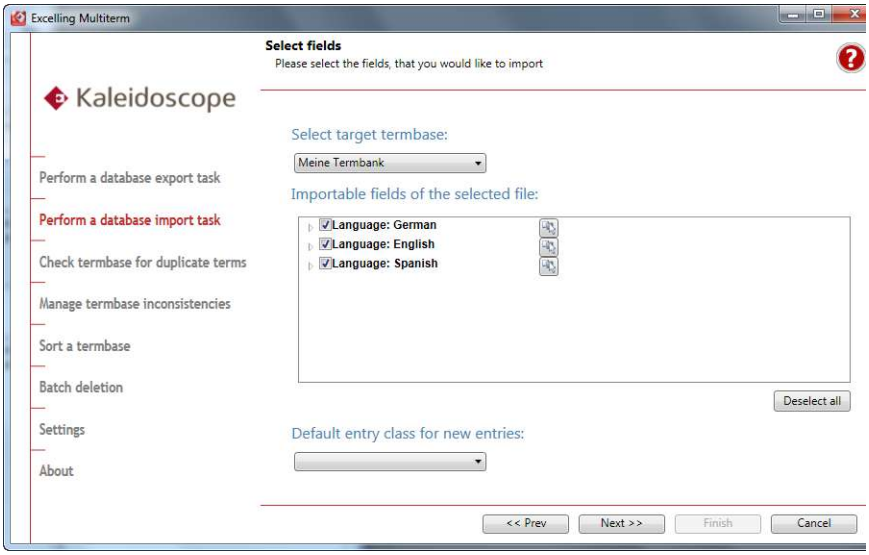
e) Since this is your first import, there are no import tasks available yet. Click on *Create import task from scratch* and click on *Next*.



f) In the *Modifier user* field, enter your name. This name will be stored in MultiTerm as the creator of the new entries. Leave the remaining fields blank. Then click on "*Next*".

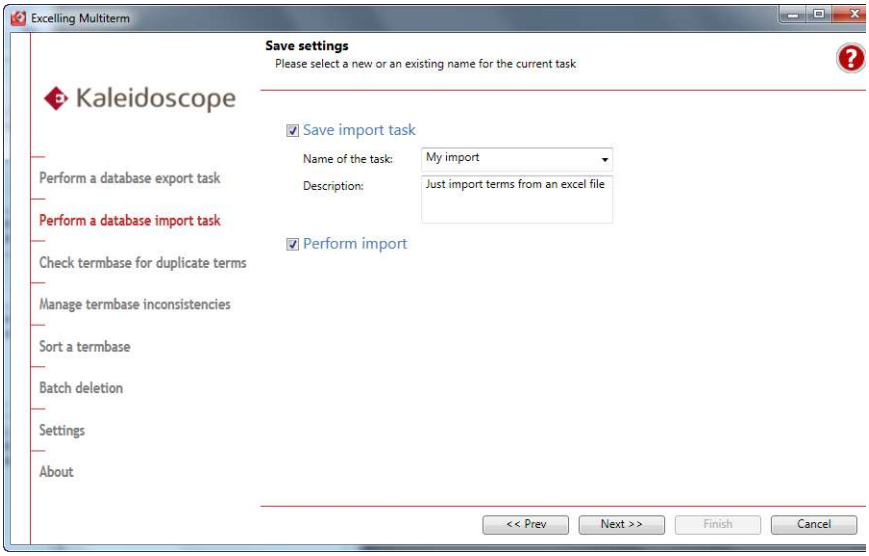


g) Select the termbase you just created as the *Target termbase*. Then select all *languages* you want to import. The list of languages contains those languages which are available both in your termbase and in your Excel file. If you are missing a language, then either your termbase or your Excel file is not prepared correctly. Then click on "*Next*".

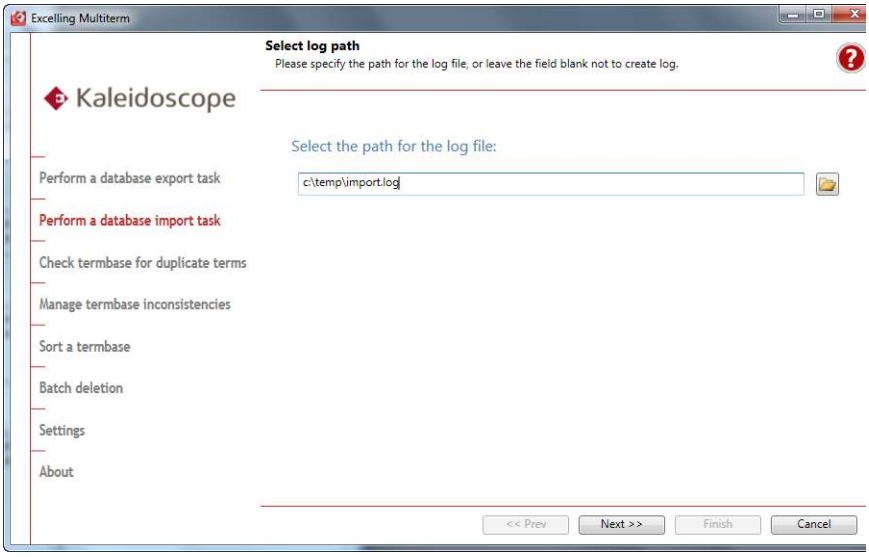


Note: If you receive the message that no termbases can be found, then please restart MultiTerm, open your termbase once, and then close MultiTerm again. This problem ocurs when the MultiTerm user interface language changes.

h) Enter a *Name* and a *Description* for the import task.
Excelling MultiTerm stores the information you have just entered as a task which you can then repeat for any identical Excel file.
Click on *Perform import* and on *Next*.

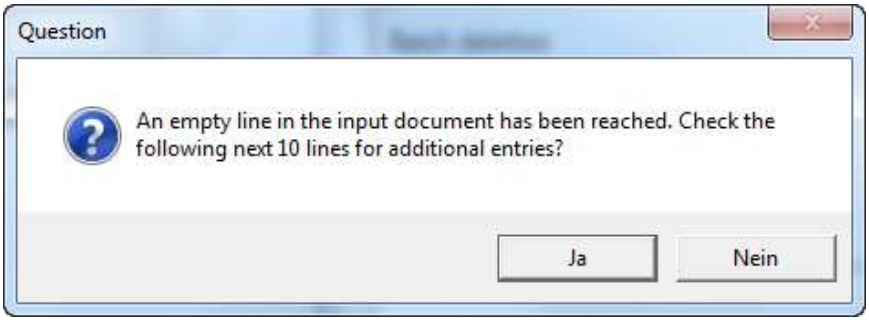


i) Enter the *location and filename* for a log file. This log file contains an exact description of what was imported and what errors might have ocurred. Then click on "*Next*".



⇨ The import will now start.

j) If Excelling finds an empty line, then it assumes that this is the end of the Excel file. If you want Excelling MultiTerm to continue searching through the remaining file, click on *Yes*. If you are sure there are not empty lines, then you can end the import by clicking on *No*.


Question
An empty line in the input document has been reached. Check the following next 10 lines for additional entries?
Ja
Nein

⇨ The data has been imported into MultiTerm. You can check the result by pressing F5 (Refresh) in MultiTerm, or by checking the content of the log file.

7.4 Additional Features of the Free Express Version

The free Express version of Excelling MultiTerm can also run an express export. This export works just like any normal Excelling export, but it only contains terms.

You can also re-import this file after editing it in Excel. See Export [→ 18] and Import [→ 27] for further information on the normal export and import features.

See also

- Export [→ 18]
- Import [→ 27]